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ABSTRACT

The primary objective of the Syracuse project was to make an empirical determination of the effectiveness of a competency-based (CB) distributive education program by comparing student achievement in three of its major components with similar traditionally organized courses at Syracuse, Buffalo, and Baruch. The three components were retailing, merchandising, and occupational work experience. In order to make the comparison, the three components were translated to a competency based format and implemented into the existing teacher preparation program. It was hypothesized that competency basing by the Houston "program translation" method would make possible implementation of the CB components in the limited time frame permitted by the project. This proved to be the case. The competencies developed were validated locally and statewide by a group of reactors including distributive education teachers, public school administrators, businessmen, and students. National validity was added by a comparison of the competencies with the technical objectives of the Lucy Crawford research study (1968). The competency based format was implemented in retailing in fall 1974 (N=67), in merchandising in spring 1975 (N=56), and in occupational work experience in fall 1975 (N=18). The project is developed and reported in a manner which provides a usable case history of the development and implementation of a CB program as well as an empirical comparison of student achievement in CB and nonCB programs. The study is also unique in that the components studied, while part of a teacher preparation program are in a content area rather than a professional education area. (Author/HD)

FINAL REPORT

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COMPETENCY BASED PROGRAM IN
DISTRIBUTIVE EDUCATIONApplied Research Project in Vocational Education
Conducted Under
Part C of Public Law 90-576

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DESIGN AND IMPLEMENTATION OF A COMPREHENSIVE PRE-SERVICE
TEACHER EDUCATION PROGRAM IN DISTRIBUTIVE EDUCATION
WITH EMPIRICAL DETERMINATION OF THE EFFECTIVENESS
OF THE MAJOR COMPONENTS

Final Report Abstract

The primary objective of the Syracuse project was to make an empirical determination of the effectiveness of a competency-based (CB) distributive education program by comparing student achievement in three of its major components with similar traditionally organized courses at Syracuse, Buffalo and Baruch. The three components were retailing, merchandising and occupational work experience.

In order to make the comparison, the three components were translated to a competency based format and implemented into the existing teacher preparation program. It was hypothesized that competency basing by the Houston "program translation" method would make possible implementation of the CB components in the limited time frame permitted by the project (Houston, 1972). This proved to be the case. The competencies developed were validated locally and statewide by a group of reactors including distributive education teachers, public school administrators, businessmen and students. National validity was added by a comparison of the competencies with the technical objectives of the Lucy Crawford research study (Crawford, 1968). The competency based format was implemented in retailing in fall 1974 (N=67), in merchandising in spring 1975 (N=56), and in occupational work experience in fall 1975 (N=18).

Student achievement in the CB retailing component at Syracuse in 1974 was compared with that of similar groups of students taught the same content in traditional format with the same instructor at Syracuse in 1973 and different instructors at Syracuse and State University College at Buffalo in 1975. Student achievement in the CB merchandising component at Syracuse in 1975 was compared with that of similar groups of students in the traditional format with the same instructor at Syracuse in 1974 and different instructors at State University College at Buffalo and CUNY's Baruch College in 1975. Student achievement in the occupational work experience component at Syracuse taught in traditional format in 1974 and in CB format in 1975 was also compared.

Assessment instruments included multiple choice tests, computational problem sets, written projects simulating retail businesses, checklists and descriptive rating scales. Student characteristics of groups and instructor ratings were compared. No competencies were included in the analysis unless instructors had included them in their course. Chi squares, t tests and analysis of variance were the main statistics used for comparisons

with the Scheffe method used for aposteriori comparisons. The analysis showed significant improvement in student learning outcomes at either .01 or .05 level under CE formats compared to traditional ones for all components. The results thus strongly favor the CB format.

The project is developed and reported in a manner which provides a usable case history of the development and implementation of a CB program as well as an empirical comparison of student achievement in CB and non-CB programs. The study is also unique in that the components studied, while part of a teacher preparation program are in a content area rather than a professional education area.

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CHAPTER I

INTRODUCTION

The Distributive Education Teacher Preparation Department of the College for Human Development and the School of Education at Syracuse University has undertaken a research and development program in the area of curriculum renewal. This applied study approach will produce information for developing individualized, performance oriented, competency-based, pre-service teacher education programs in distributive education. In the process of the implementation of the Syracuse University program, empirical data relative to the effectiveness of some of the major components of a competency-based program will be provided and compared to traditional programs.

Background

Despite the broad impact of the competency-based movement on American teacher education, no one has really determined empirically whether or not, or to what extent, competency-based instruction improves the learning, attitudes, knowledges and skills of the students.

Ashmun and Larson in their "Review and Synthesis of Research on Distributive Education 1966-68," stated, "Most of the research centered around characteristics rather than outcomes. Therefore it is difficult to determine whether or not programs are accomplishing what they are supposed to accomplish" (Ashmun & Larson, 1971, p. 63). The National Dissemination and Interpretation Seminar in Distributive Teacher Education held at Blacksburg, Virginia, directed by Dr. Neal Vivian as part of the Lucy Crawford study "A Competency Pattern Approach to Curriculum Construction in Distributive Teacher Education" (Crawford, 1969) listed curriculum development as a high priority area for further research. Other needs for further research suggested in this study included:

- a. Experimentation of ways and means of accomplishing educational objectives at various levels, including teacher education.
- b. Construction of a competency pattern for distributive teacher education.
- c. Construction of measurement instruments.

Dr. Vivian in his conference paper, "The Development of a suggested Matrix for Distributive Education Research" (Crawford, 1971), asserts, "A major thrust must be made to identify desired outcomes and develop and organize learning activities, establish evaluative criteria, develop refined measuring instruments and conduct experimental research."

The Crawford study (Crawford, 1969) developed a set of professional competencies needed for distributive education teacher coordinators. The technical teaching competencies from the same study, which might be considered the subject area competencies, are used to validate the competencies developed in this study. Also, Cotrell developed a list of 256 competencies in his instrument in a study generally recognized as the most comprehensive in the area of general occupational teacher competencies (Cotrell, 1971).

Although these competency lists make an excellent beginning, they must be validated for their fit with New York State Department of Education curriculum, for local relevance, and for fit with undergraduate Department of Education Training programs. One contribution of this study will be to develop strategies for tailoring competencies developed at the national level to meet local needs.

The national conference on Competency Assessment, Research and Evaluation at the University of Houston March 12-15, 1974 reinforces the concern for knowing the consequences of competency-basing (Houston [Ed], 1975). Del Schalock in his paper "Closing the Knowledge Gap," referring to the experience of the elementary model directors in trying to design and implement CBTE programs says:

In the course of these efforts, all have experienced the frustration of not having sufficient information on which to base program design decisions; all have recognized that there is little hope of improving the quality of what is being done until there is increased knowledge of what works and what does not work; and all have felt concern about the rapid move to adopt CBTE programs without clear evidence that what is being adopted is any better than what has been in operation in the past (Schalock in Houston, 1975, p. 34).

Schalock also calls attention to the need for usable case histories on the development and implementation of CBTE programs, and adds that "The most critically needed policy oriented studies involve the comparison of CBTE and non-CBTE programs" (Houston, 1975, pp. 36-37). The current project is intended to make a contribution both as a case study and as a policy oriented study.

Objectives

The objectives of the present study as presented in the original proposal for the project are:

1. Redesign the present Distributive Education program at Syracuse University in personalized performance and competency-based format with varying degrees of detail for different program components. During the course of the project components in Retailing and Merchandising, supervised cooperative work experience will be implemented

in competency-based mode. This is equivalent to a current course block of 13 credit hours.

- a. The distributive education program will mesh with the School of Education's field-oriented individualized competency-based "Project Re-Design," especially in regard to generic competencies which are being developed for all secondary teacher education programs.
 - b. The distributive education teacher preparation program outcomes must be congruent with the competencies required of the secondary students in the new New York State Department of Education curriculum for Distribution and Marketing.
 - c. A profiling system for determining proficiencies at the time of entrance to the program will be developed for areas such as liberal arts and sciences which cannot be competency-based at this time.
2. Develop competency-based instructional materials for the distributive education component of the baccalaureate program consistent with the New York State Department of Education curriculum and national concerns in distributive education and implement them through the Syracuse program.
 3. Test the effectiveness of these instructional materials by the development of appropriate assessment procedures.
 4. Test the effectiveness of the instructional materials developed and used in a competency-based mode relative to the traditional mode of instruction.

The actual time schedules for carrying through these objectives are described in Table 1 and the following pages.

Table 1

ACTUAL TIME LINE FOR DESIGN AND IMPLEMENTATION OF PRE-SERVICE TEACHER EDUCATION
PROGRAM IN DE WITH EMPIRICAL DETERMINATION OF MAJOR COMPONENTS

Academic Year 1974-1975	1/6/74 Summer 1974	1/9/74 Fall 1974	12/31/74 Spring 1975	1/6/75 Summer 1975	1/9/75 Fall 1975	2/31/75
Traditional program	Planning for Subject areas fall offerings competencies & instruction materials	Retailing 275	Evaluation SUNY Buffalo Retailing 275 SUNY Buffalo Merchandising 276	Begin Comparison Effectiveness Buffalo Traditional Syracuse Traditional and Syracuse Competency-based Program	Repeat Retailing 275, S.U. Traditional with different instructor Repeat Merchandising 276, Traditional Baruch College	Evaluation and Final Report
Planning for funding date	Subject areas Plan & develop	Spring offering Merchandising 276	Merchandising 276, S.U. Competency-based	Occupational Experience	Occupational Experience, S.U. Final Report Writing	
		Occupational Experience				
		"Re-design" School of Ed. parts in operation		Interim Report Writing	"Re-design" School of Education additional parts in operation	
		-----Profiling Process----->		Evaluation-----		

Key: Development: _____

Operation: -----

September 1 -
December 31, 1974:
(fall semester)

- Instructional materials were used in personalized competency-based mode for Retailing 275 at Syracuse.
- Evaluation of student achievement in fall offering, Retailing 275.
- Development of competencies for Merchandising 276, spring semester offering.
- Development of instructional materials and assessment procedures for spring offering of Merchandising 276.
- (Occupational fieldwork, Traditional mode, was in operation.)

January 1 -
May 31, 1975:
(spring semester)

- Instructional materials for spring offering, Merchandising 276, were used in personalized competency-based mode at Syracuse.
- Retailing 275 offered traditional mode at SUC Buffalo with S.U. assessment procedures.
- Merchandising 276 offered traditional mode at SUC Buffalo with S.U. assessment procedures.
- Math diagnosis process developed and implemented.
- Profiling process continued to be examined.

June 1 -
August 31, 1975:

- Student achievement on developed competencies taught in personalized competency-based mode were compared to achievement of students in Retailing and Merchandising in S.U. traditional program of 1973-74 and SUC Buffalo traditional program, 1974-75. Their tests and papers were re-evaluated in terms of developed competencies.
- Competencies were developed for field-based occupational experience.
- Instructional materials and assessment procedures for field-based occupational experience were developed.
- Progress report prepared.

September 1 -
February 27, 1975:

- Field-based occupational experience will be conducted in competency based mode, S.U.
- Comparison of student achievement in field-based experience directed in competency-based mode compared to traditional mode of fall, 1974.
- Repeat Retailing 275, S.U. Traditional mode, with different instructor.
- Repeat Merchandising 276, Traditional mode at Baruch College.
- Final data analysis.
- Report writing.

CHAPTER II

METHODS AND PROCEDURES

The primary objectives of the Syracuse project were to make an empirical determination of the effectiveness of a competency-based program by comparing student achievement in some major components in the pre-service distributive program. The three components selected were retailing, merchandising and occupational work experience. In order to make the comparisons, it was necessary to put the components into competency-based format and implement them into the program. The first two components were implemented during the first year of the project, the occupation work experience was completed in fall 1975.

A. Competency-Basing and Implementing of the Retailing Component

The design called for an initial competency-basing of these components using the "Program Translation" approach of Houston (Houston, 1972).

In this approach, the staff simply reformulates current courses. The current requirements are re-written as behavioral objectives for each course with perhaps institution of some changes in the mode of instruction. In some colleges, one course is piloted before others are translated to competency-based instruction. After an initial trial in which students are limited by terms or semester, time constraints may or may not be lifted. . . . Note that in this approach, each course is independently revised to CBTE. Little or no attempt is made to reformulate or reconceptualize the total program.

. . . . Sometimes the name of the unit of instruction is changed from "course" to "component" or "module" but such alternations do not mask the typically minor nature of underlying programmatic changes.

The first two major components dealt with at Syracuse University were in the content areas of Retailing and Marketing. Houston's approach was strengthened by having Dr. Paul Eichmann, staff consultant from the Center for Instructional Development work with the instructor to re-think these components with the commitment to reformulate their content if this seemed desirable. The following attributes were examined in some detail; nature and experience of present student body; examination of a broad sampling of current elementary text books in Retailing; the new secondary curriculum in New York State for Distributive Education teaching as career options for graduates; success of employed graduates on the job. (This counselling led to the conclusion by faculty, researcher and consultant, that the present content and expected level of achievement was appropriate for the purposes of the program).

During this process it was decided to change the course format. Retailing 275 had been offered in a traditional lecture-discussion format with two tests, one given at midterm, the other at the end of the course. The final test covered material from the second part of the course. A project was due at the end of the term. The instructor had found that with this traditional format, when students began to develop their projects, they had forgotten their research resources. She spent a great deal of time re-orienting them to resources and reviewing principles covered early in the term. It was hypothesized that if the project was undertaken in sections with the application following the learning of principles in a specific topic area that student achievement would be better. There would however be a tradeoff in instructor time from individual counselling and class-time with time spent grading a much larger number of papers. However, it was intended that the sum of the smaller papers would not exceed that of the project done all at one time. Theoretically there was no reason why students could not have been working on their projects during the entire term in the old format, however it was obvious to the instructor that it was not the pattern and that the great majority tended to start their projects about three weeks before the end of the term.

The traditional course format is illustrated in Figure 1. The competency-based format was redesigned into eight modules as diagrammed in Figure 2.

The staff then rewrote the traditional course requirements in competency statements following this format. The traditional course outline is included in Appendix A. The competency statements developed are displayed in Appendix A.

Validation of Competencies developed at Syracuse University

It was hypothesized in the design of this project that implementation of a competency-based program is much faster and more feasible if the order and organization of the competencies follows the general pattern of presentation used by the faculty. This has proved to be the case by developing and implementing major competency-based components within a year at Syracuse University.

The competencies developed at Syracuse under the program translation method were validated locally and statewide by a group of distributive education teachers, school administrators, students and businessmen, who rated their importance for future distributive education teachers on the questionnaire illustrated in Appendix B. These reactors were from a 27 member Advisory Committee and a Council of 33 Distributive Education teachers. Some additional reactors were attending the inservice Distribution Education workshops in the summer of 1975. The organization of and contribution of these groups are explained in detail in Appendix B.

Altogether 25 people rated the retailing competencies. Only nine competencies out of the 117 were rated unimportant by anyone--seven of these were so rated by only one person and the other two by two people. Approximately 30 percent of the group rated the following competencies of limited value--1.23, 1.24, 1.5, 3.13, 3.14, 5.16, 5.27, 7.2111. They were scattered

Figure 1

PRINCIPLES OF RETAIL MANAGEMENT (RETAILING 275)

General Learning Sequence Diagram - Traditional Format Syracuse University
Fall Semester - 1974

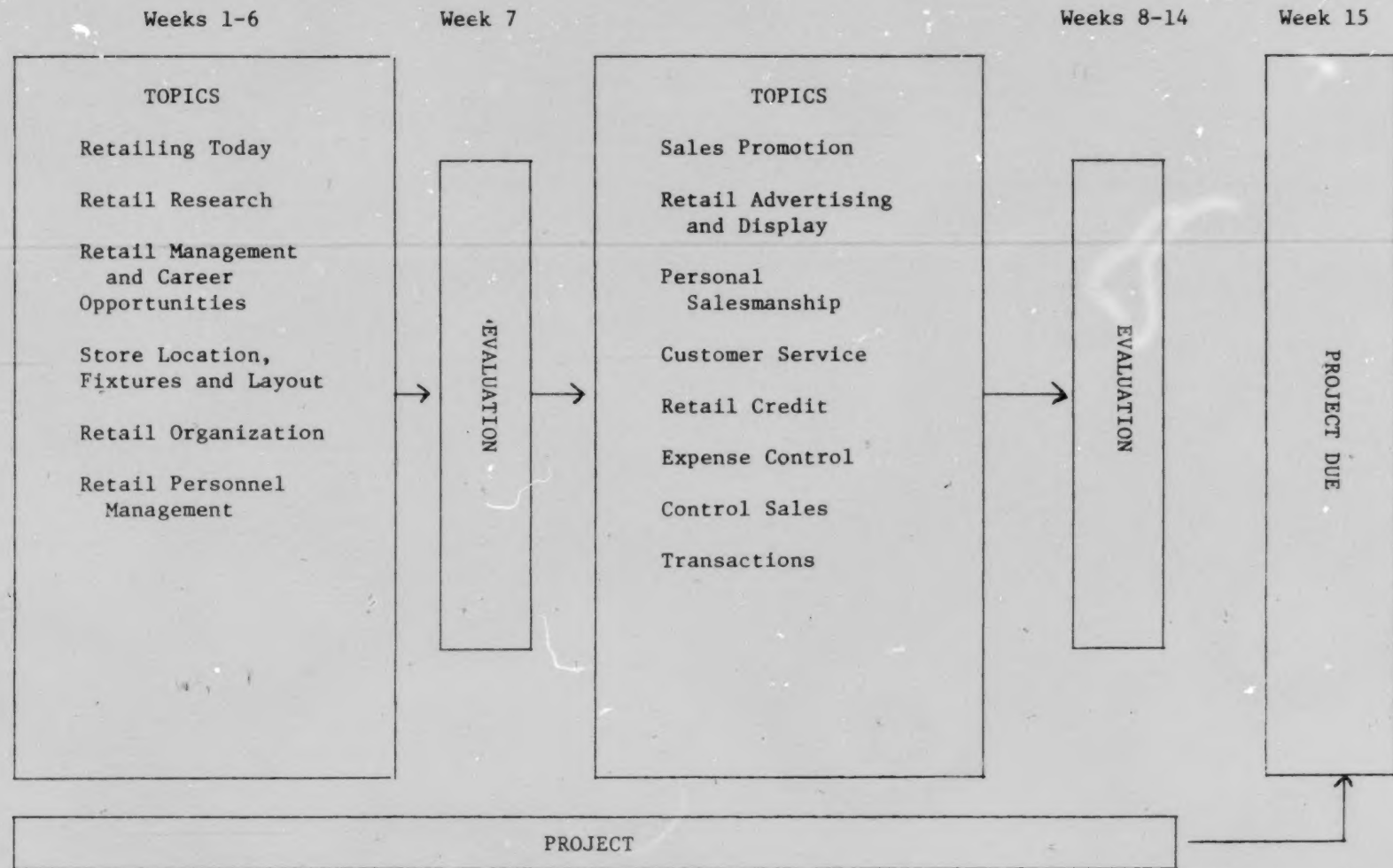
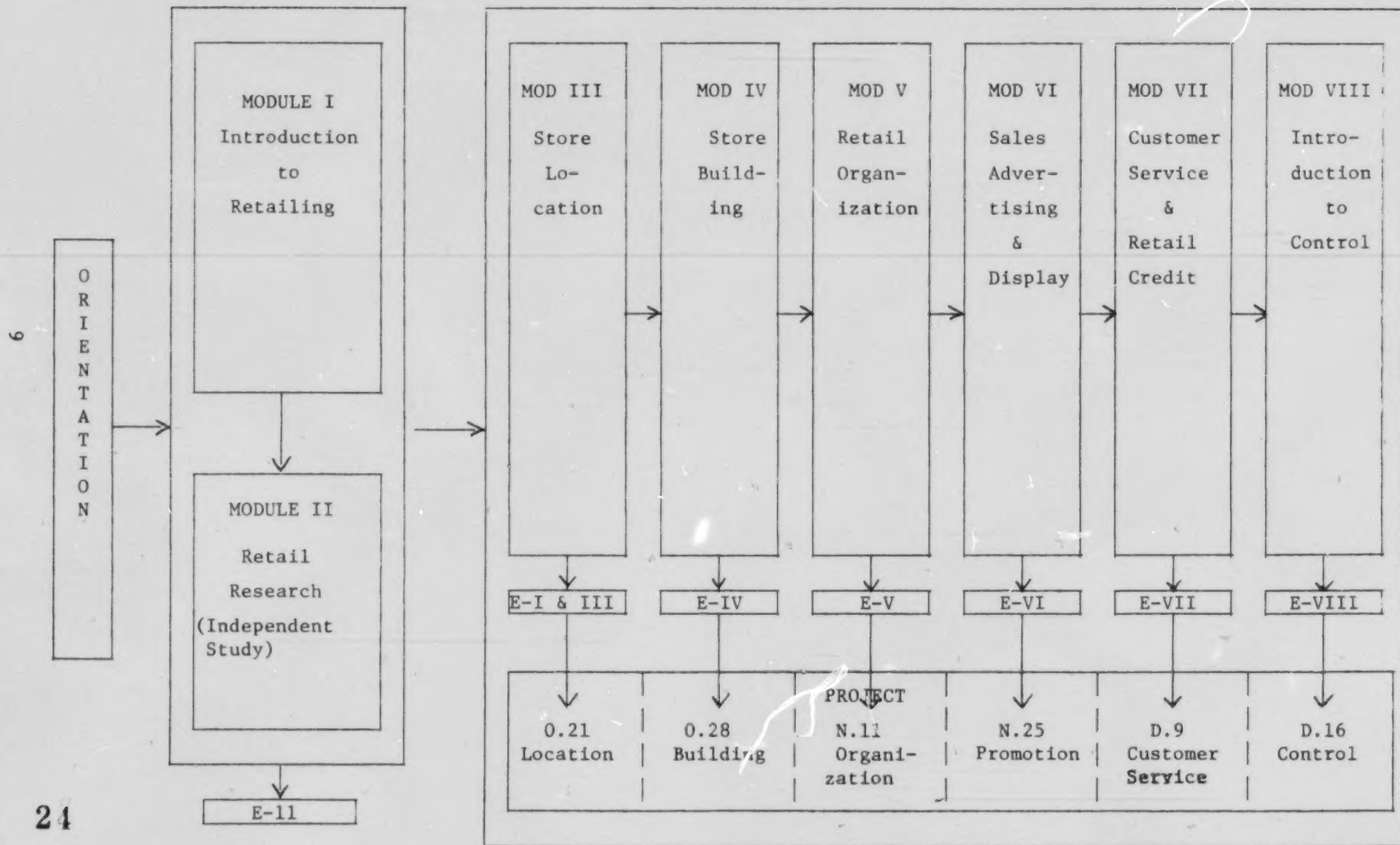


Figure 2

PRINCIPLES OF RETAIL MANAGEMENT (RETAILING 275)
General Learning Sequence Diagram - Competency-Based Format
Fall Semester - 1974



throughout the course. All the competencies were rated as essential or important by more than 70% of the group responding. No new competencies were added or suggested by anyone. The rating of this group adds validity to the competencies in the Syracuse program for New York State teachers.

Further support for the validity of the Syracuse University competencies comes from a comparison with those developed by another method in the Crawford Study. The educational objectives to develop the technical teaching competencies in the Lucy Crawford study (Crawford, 1968) are organized around ten areas of study: selling, display, advertising, communications, mathematics, human relations, operations and management, product and/or service technology, merchandising and economics and marketing. Competencies needed by distributive workers in the 76 jobs included in this study were evaluated by seven distributive education teachers in terms of their importance for the high school distributive education teacher-coordinator (Crawford, 1968, p. 1378).

The major areas of study from the Crawford list included in the Syracuse University retailing and merchandising components are operations and management where 27/36 objectives were included; merchandising where 13/20 were included and economics and marketing where all objectives were included. Many of the Crawford objectives are stated in terms that can only be assessed in a working environment and are demonstrated in the Syracuse program during their occupational experience. This is particularly true in the selling, communication and human relations areas. The retailing and merchandising components offer an introduction at the knowledge level in the areas of selling, display, advertising, communication and human relations and product and service technology. Other entire courses reinforce each of these areas. The Syracuse University competencies are included in Appendix A.

Mrs. Lucy Crawford, a major researcher in the field of Distributive Education and author of the aforementioned study, spent two days consulting in Syracuse with the staff of the present project. Her insights and suggestions were extremely helpful in furthering the design and implementation of the Syracuse program.

Development of Independent Study Materials

A booklet "Selected Resources for Retail Research" was compiled and written by Margaret Charters for the competency-based format. The resources selected to be included were suggested by Charlotte Raphaelson as those most frequently used in student research for the retailing component. THE BOOKLET FORMS APPENDIX J OF THIS REPORT. With the use of this booklet, the traditional topic of "Retail Research" which had included one class lecture and a lecture-tour of the library by the business librarian, became primarily an independent study unit as Module 2, under the competency-based format. Students were required to use the booklets to research answers to ten problems typical of those they would encounter in their own final course project of designing a store. Each student had a different set of problems and was required to find correct answers to 80% of them before starting on their project. A typical assignment is included in Appendix D. The lecture and tour were retained so that any change in student achievement could be attributed to the use of the booklet "Selected Resources in Retail Research."

Student Evaluation of Syracuse University
Competency-Based Retailing Component

A questionnaire, entitled OMNIQUEST from the Center for Instructional Development was adapted by the project staff for student evaluation of Retailing 275. A copy of the form and a detailed list of responses by item from 58 students is included in Appendix C.

All things considered, almost 70% of the students rated the course excellent, 21% good and only 3% as low as fair. Sixty-nine percent said they would take more courses designed this way, 28% said they would not. The reasons for the latter judgment are not clear although the percentages closely parallel those of the following question where 67% judged that it was an advantage to take a quiz on the text and lecture before doing each section of the project and 24% said it was not. Another reason reflected by a student comment was, "Although it was easier to space out the paper in modules, the course required constant attention." There were five omits, so the percentage of those responding to the item that judged it an advantage to take the quiz and project in the present format was 73%. Responding to the same question expressed differently (#9), only 19% of the students reported they would prefer to have the project as one assignment at the end of the course. Three-quarters of the students considered the load heavy to excessive. None felt it was light!

The directions to the students for the course may have caused some difficulty. The closeness between the development and implementation of the new format resulting in some lack of clarity in instructions was reflected by the fact that almost one-third of the students felt that the directions for the course were "generally confusing and inadequate." This was an entirely new format for the students also, but despite this, 17% of the students found the directions "very clear and comprehensive" and 45% found them "fairly clear, but missing important elements."

Seventy percent of the students responding judged the lecture groups to be "moderately effective" and 57% judged the interest level of the meetings to be "interesting." Materials were generally available when needed, 82% said "usually" or "always." Opinion on the readings in the course was almost equally divided between "very beneficial" and "adequate."

Fifty-nine percent rated the text "good," 28% rated it "excellent." Sixty-two percent of the students felt the project to be "difficult but worth the effort" and 17% felt it to be "highly rewarding." However, another 17% considered it "too hard and too confusing." Eighty-six percent of the students judged the tests to be either "very fair; well matched with what was taught" or "fair, generally, but always matched what was taught." The wording of this question may have been unfortunate in that the students may not have considered what was in their readings and text as being included in "what was taught." Almost 90% considered the grading good or excellent. The opportunity to meet with the principal instructor and teaching assistants was rated good to excellent, the assistants being a little more available. About one-quarter of the students felt the opportunity to meet with the instructor directly was only fair.

On the whole 59% of the class felt they had learned a "great deal," 45% that they had learned "some." Only 5% had learned "not very much." More than half the class found the course frequently an enjoyable experience, 16% found it "always enjoyable."

The students were asked if there were any topics or materials not included in the course that they would like to have covered. Only 14 students responded and no trend was evident. Response was light to a question about their preference for parts of the course to be put into programmed booklets or "reading only," and generally in the negative. In response to what was "the least valuable" thing about the course, over half of those who responded felt that the class reporting on current news items from the field of retailing was wasteful. About five students made some reference to time taken in giving instructions in class. Thirty-six of the 58 respondents to the OMNI-QUEST gave no reaction at all. The "most valuable" thing about the course was considered to be the final project on designing a store. Over half of those responding mentioned the project.

Student Evaluation of Independent Study Materials

Reaction to the Research Resource module and the booklet "Selected Resources for Retail Research" was gauged specifically by a set of questions in the OMNI-QUEST. The booklet itself was considered "very clear and comprehensive" by 14% of the students, 40% found it "fairly clear but missing important elements" and 16% found it "generally confusing and inadequate." Only one student found it a waste of time. The assignment, forcing the students into the resources for the first time, was considered "very beneficial" by 40% of the students, "adequate" by another 31% and "confusing" by 26%.

Narrative responses to the question about general student reaction to the booklet and reasons for it were generally favorable. Twenty-three students did not respond. Students were also asked to edit the booklets and write any reactions in the booklets. These latter comments indicated that the books had been very useful and the major suggestion was that more resources be added so that the booklet could be more useful for Merchandising 276 as well. Time constraints on the project have prevented expansion and revision of the booklet.

Instructor Evaluation of Development and Implementation of Syracuse University Competency-Based Retailing and Merchandising Components

One of the conditions essential for the implementation to any design in competency-based program research is to find persons responsible for such programs that are willing to take part in a comparative research study (Schalock in Houston, 1975). It is also necessary to maintain the delicate balance in the data collection system that supports both program operation and basic research with good data. The imposition of any data collection system on an instructional system causes additional strain, and when the format is being changed at the same time, it becomes more complicated. At Syracuse, the instructor in both Retailing and Merchandising and the Retailing and Distributive Education program director are the same person. Her cooperation was outstanding.

The following section of the report written by the instructor will reflect on the problem areas as well as positive points from the view of an instructor teaching under a new concept, to a class of students who had never been exposed to the competency mode of instruction. Students enrolled in a competency-based program for the first time and the teacher-educator implementing the instruction under this format, although having taught the content for several years, face similar problems due to the differences of organization and management. The class size was the largest ever taught by the instructor. There were 68 students. The largest previous class had been 55. Although the content was the same and the format, lecture/discussion method was the same, the instructor felt, in the beginning, the pressure of organization and management of the competency-based program. The content had been modularized, and competencies were clearly stated. At first, the instructor felt pressure to work within the time frame of each module. Some of this pressure probably came also from a change of class time. The traditional program had been taught in three separate one-hour sessions per week. The competency program was taught in two one-and-a-half hour sessions per week. Although equivalent, in time, it did make a difference in time span. The instructor changed her teaching style somewhat in the second set of modules. Whenever possible, seminar style was used, with the instructor sitting down with the students during discussion. On the days that attendance was off, either because of students taking other options or other reasons, the class time was much more enjoyable for both instructor and students. This suggests that at full attendance, the class size was too large. It is felt the smaller class and more informal method works to better advantage in the competency mode as well as in the traditional program.

The first set of materials under the title "Principles of Retail Management" contained eight modules. Students were given their syllabi for the semester which included each competency they would be expected to have completed at exit from each module, as well as a description of the competencies expected in the final paper. To help make a transition from traditional format, the students were also given a topical outline including dates for initial quizzes, field trips and speakers. Copies of these materials are included in Appendix A.

In an effort to answer questions many students asked, a time schedule in chart form was evolved and later criteria was developed and distributed.

The problem seemed to be twofold. Students had difficulty in integrating all the directions and had just too many pieces of paper to contend with. The chart helped to eliminate most of these problems. As the semester progressed and students became used to the system, classes went more smoothly.

The instructor found that too much time was diverted from actual teaching to organization and management during each class session. The printed instruction and competencies had to be explained many times over. As a result, the instructor felt certain frustrations in not being able to discuss enrichment materials usually covered. About one-third of the students as reported earlier in this report, found the directions for the course "generally confusing and inadequate," the rest found them at least "fairly clear," 17% felt them to be "very clear and comprehensive." It is, of course, the first

group that took class time. However, when asked "Are there any topics or materials not included in the course that you would like to have covered," only five students made any suggestion and one of those was for another field trip.

In developing the experimental modules, the research team also developed assessment procedures for evaluating the competencies. A series of short tests as well as a paper at the end of each module was required. Alternate tests were developed so that students could make up competencies not achieved at minimum level. Two make-ups were permitted. It became difficult to maintain a sufficient bank of equivalent test questions on each competency for make-up testing in the time frame available. Students were also permitted to re-do papers which did not meet the criteria for minimum competency. Since the program is still locked into the University system of submitting grades at the end of the semester, incompletes were given to students who had not achieved competency levels. Competencies included those in the Research Module, tests, and papers. Fifteen incompletes were given; four were non-majors, 11 were majors. Of this number, 75% of the non-majors have not completed the competencies for a grade; 27% of the majors have not completed the competencies. It would seem that majors are more likely to complete the program than non-majors. This proved to be the case by the end of the project.

There was no problem in correcting multiple choice questions as they were computer scored. However, reading and evaluating five sets of papers (Mod I - IV, V, VI, VII and VIII) for 68 students or 408 papers total, in one semester, convinced the instructor that a different method had to be found for the application of the competencies for the spring offering "Principles of Merchandising." Despite the fact that students were requested to keep their papers (the project) to three or four pages, they tended to be longer and the total much greater than under the traditional format. It may be noted here that the instructor was the only content person in the research team. Even with two graduate assistants, and a researcher, developing test questions, competencies taught, the papers, the classroom situation, advising students was excessively time consuming, especially if data collection for later use in the major conclusions of the project was to have validity.

Conclusions of the instructor at the end of the fall semester, as they related to the issue of management in implementation of competency-based programs were as follows:

1. Students were not accustomed to being given expected competencies in writing.
2. Students were not accustomed to studying and writing to specific expected competencies.
3. Students who were not majors in the field and did not care to earn credit hours did not make up their incompletes.
4. Students constantly asked questions, the answers for which were included in the syllabus. Some students did not think the directions were sufficiently explicit.
5. Organization and management became an important factor in the competency based program.

- a. Management of resource materials - availability in the library
- b. Organization of records
- c. Having the student understand the criteria for competencies which would be converted to grades for the purpose of grade record consistency. Students were extremely grade conscious.

As a whole, the problems were the problems of organization and management of retrieving all information, to correctly record it, and to be able to work with each student individually. The foregoing conclusions, reached at the end of the first semester, helped immensely in planning the second experimental set of modules.

1. Four modules were designed for the second semester instead of eight.
2. The application, the term paper or project, was divided into two sections.
3. The class population was kept to 55 instead of 68.
4. Review sessions, on test materials, were given outside the class time.
5. Make-up tests for reaching competency were limited to three tests on the first module and to one each on each of the last three modules.

Nagel and Richman refer to the teacher training in a traditional program. "Have some kids failed? Do you wish you had more time to work with your students? Are you a victim of the clock?" Although Nagel and Richman (1972) were referring to a traditional program the instructor on this project in the beginning had a similar problem. She was very conscious of covering each competency within the time frame of each module. In a sense she did watch the clock. However, as she became more involved with the whole process and saw that the competency mode was resolving students' individual needs, her own frustrations disappeared. Since the program was using the Translation Process, her approach in the classroom was still the same. The class became an enjoyable experience; problems went by the wayside.

The second semester proceeded much more calmly. All students except for just six new students were accustomed to the new language and explicit competency instruction.

In becoming completely involved with the business of teaching, the instructor did not stress in the classroom after the opening week the various options open to students. It was assumed that students who had not signed up for alternate ways of learning were attending classes. Attendance was not constant. The instructor suspected students were using other materials and coming to those lectures they felt they needed. Because the instructor felt the privilege of "incompletes" in the grading system had been abused, it was allowed only to majors.

All of the five above suggestions made at the end of the first semester for the second set of modules were implemented. Organization and management ceased to be as great a problem.

Many students did feel that the instructor was not as available as the graduate assistants. However, regular office hours were kept and appointments were easily made. After class students, ten to fifteen at a time, had the tendency of following the instructor to her office for further discussion. It is believed that this caused some problems, because everyone wanted to talk at once. This has always been experienced by this instructor. As classes become larger, it becomes increasingly difficult to cope with. However, it should not be discouraged since it is at that very moment students sometimes have their most important questions.

The major conclusions drawn by the instructor in the area of organization and management are:

1. That competency-based instruction has to be clearly presented to the student so that there is no misunderstanding the competency, the criteria, and if need be, the final grading system.
2. That the class be kept small for maximum teacher-student relationship or that enough alternate teaching strategies are made available to the student, leaving more time for the teacher-educator to spend with the individual student.
3. Management again must be emphasized. Although clearly stated directions for alternate ways of achieving competency had been provided, a number of students stated, at the end of the second set of modules, that they had studied independently, but had not informed the instructor of their decision to study independently. Therefore, they did not receive additional enrichment materials.
4. Record keeping, whether by manual or computer method is an important consideration.
5. Once the instructor and the students were able to communicate with each other in the competency mode, all were in favor of the change.

Students communicated to the instructor that studying to specific competencies, knowing in advance what was expected of them was helpful. Instructor and students, alike, were pleased with the idea of students being able to retake tests and redo papers. Students' reasons may be a reflection of student consciousness about grades. Whatever their reasons, the competency mode allowed them greater chance for achievement. The instructor felt a great satisfaction in knowing that her students knew that their instructor wanted everyone to achieve competency or beyond.

6. Since the design and implementation of the program was done within an incredibly short time, the instructor admits that the pressure of administering and teaching may, at times, sound negative. However, it is not meant to. It is hoped by pointing out problem areas, such as in the organization and

management aspect of this current project, other programs will benefit from these experiences.

There is no question in the instructor's mind that the program produced positive results with students and that this research project will continue to prove that the competency based mode of instruction will help students to obtain their optimum personal goals.

B. Competency-Basing and Implementation of the Merchandising Component, Spring 1975

In planning the format for the Merchandising component to be offered in spring 1975, the staff planned to move ahead in the direction of individualizing instruction and give students the option of independent study in one or all of the modules offered. Traditionally the course had been offered in lecture-discussion format with three tests during the term and a final paper. Eighty-two percent of the 56 students enrolled in Merchandising had also been in the Retailing program the previous semester. This was a typical pattern of enrollment due to program requirements, but past experience had indicated a much greater range in student readiness for the merchandising concepts than those in retailing, especially in the computational areas. It therefore seemed to be a situation where the self-pacing permitted by independent study would make a real contribution to greater learning by students.

A 10 item arithmetic test had been developed the previous year to identify students who might need extra assistance. The same test was used in 1975 as a pre-test so that comparisons between the two groups of students might be made. A copy of the test is included in Appendix D.

The directions to the students stated:

All students in Merchandising 276 will be required to take an arithmetic pre-test at the first class session. It has been found in the past that students who are rusty on their math skills will have difficulty doing the computations necessary for the merchandising class. If you do not pass the test the first time, you will be directed to a Tutor Text booklet in the Independent Learning Lab. When you feel you are ready to take an alternative exam, please speak to Miss McIntosh in Room 311. You can take up to two makeups, but you are required to have passed this arithmetic skills test by January 30th. This test is on a pass-fail basis and is considered as a pre-requisite for Merchandising 276.

The student scores from taking the 10-item test the first time, displayed in Table 2, confirmed the hypothesized range in readiness.

The content of the merchandising component was divided into four modules. The fewer number of modules was expected to simplify the management problem. The students were to combine the papers for Modules 1 and 2 and for Modules 3 and 4, which were due at mid-semester and at the end of the term. Tests on principles and computation were to be given after each module and before

Table 2

STUDENT SCORES ON ARITHMETIC PRE-TEST
FOR MERCHANDISING 276

Student Score	Frequency	
	Number	Percent
1	2	4
2	2	4
3	2	4
4	1	2
5	2	4
6	5	9
7	6	11
8	6	11
9	18	33
10	10	18
Total	54	100

students proceeded on their projects. The learning sequence for Option I, as described above is diagrammed in Figure 3.

Mrs. Mary Good, a former graduate student in the program, had developed a set of programmed booklets based on the content covered in the traditional Merchandising 276, in 1974, as a Master's project. Two of these had been used experimentally in the spring of 1974 as remedial help for students having difficulty in the course. The staff felt that these materials might be used with some others as the basis for independent study options. Some additions to the booklets were necessary especially in developing computational pre-tests. When used as remedial materials, the course exam had served as a pre-test, as students were only referred to the booklets after failing the traditional course exam. Some page samples of these booklets are included in Appendix D. Worksheets referring students to additional materials were added to complete the independent study option. Examples of the worksheet are included in Appendix D.

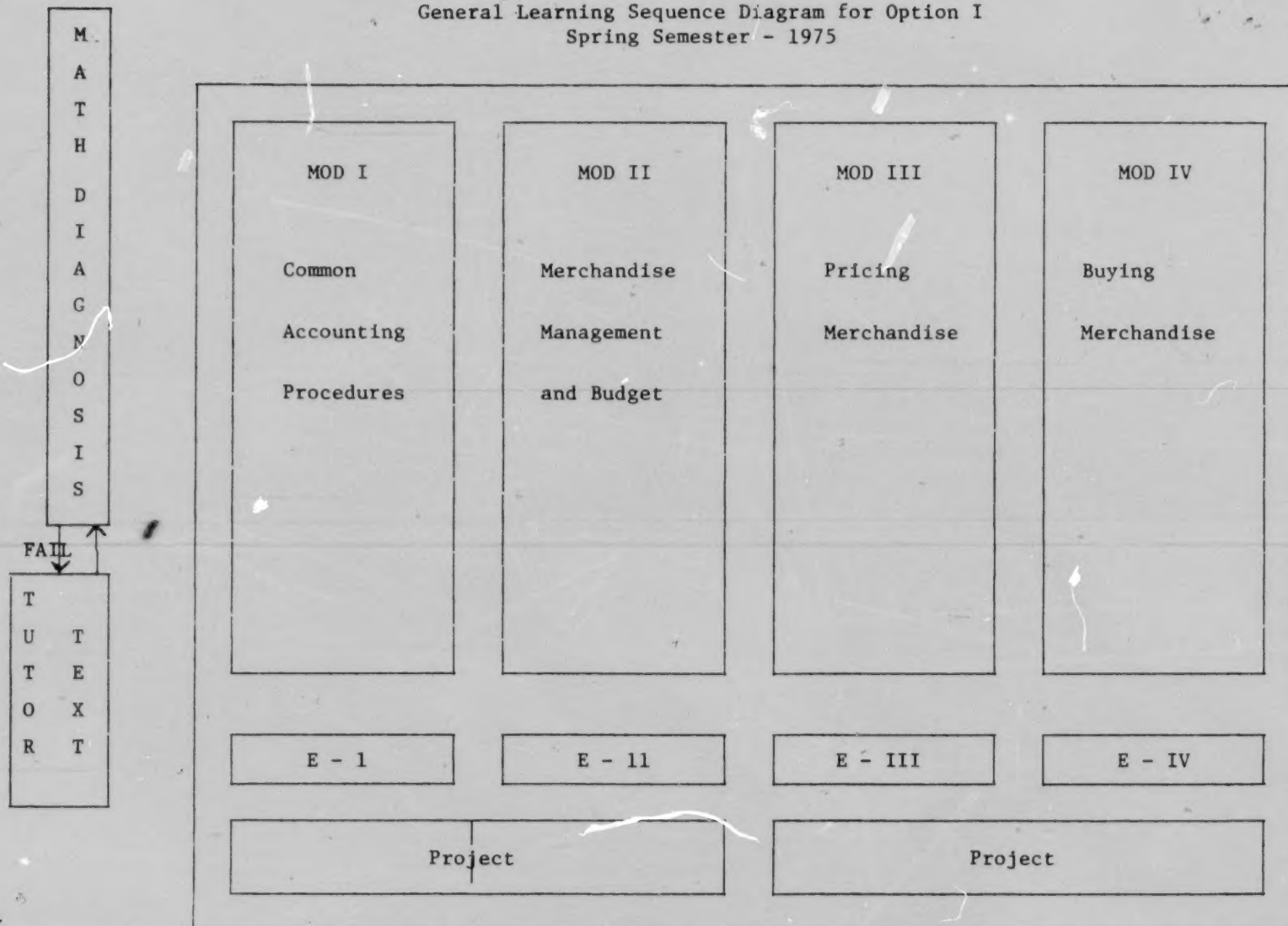
The class sessions in merchandising were planned so that all competencies were introduced and discussed on Tuesdays and problem practice was limited to Thursdays, so that students could attend either or both sessions, as their options dictated. They were also permitted to omit a module on the basis of pre-testing. The options were explained to the students with the following set of instructions:

1. It has been found in the past that due to broad work experience or other academic courses that some students have already covered some of the material in Merchandising 276. If you are such a student and wish to try to test out competencies 1.1 and 1.2 of Module I, report to Ron Loiacono in Room 312 anytime on Wednesday morning January 22 to take a pre-test on this module.

Figure 3

PRINCIPLES OF MERCHANDISING

General Learning Sequence Diagram for Option I
Spring Semester - 1975



- a. If you pass the computation section of the Module I test you will not be required to attend the problem practice sessions on Thursday. You may wish to take advantage of Mrs. Raphaelson's advanced discussion sessions on Thursday, however, which will be held concurrently for one hour.
 - b. If you pass the theory section of the test, you will not be required to attend the Tuesday theory sessions, unless you choose to.
 - c. If you pass the entire test, you will not be required to attend class for Module I, although you may wish to take advantage of the advanced discussion sessions on Thursdays to assist you with your project. You may then begin directly to work on your project. The same opportunity will be given at the beginning of each module to test out.
 - d. Please note the project is required in all cases.
2. You will be given the opportunity this semester to take sections of Merchandising 276 by independent study if you so desire. You may make your decision one module at a time. That is, if you decide to try Module I by independent study you may take Module II by the classroom route or vice-versa. You have four options.

Option I: Attend class and follow the entire course outline.

Option II: Attend class on Tuesday for Theory and Problem Demonstration sessions. Use programmed books, worksheets and readings for independent study on merchandising computations. You may wish to attend Mrs. Raphaelson's advanced discussion sessions on Thursday. The final test on Module I will be taken with the class as listed in the course outline. Attendance on days guest speakers are invited is mandatory.

Option III: Attend class on Thursdays for Problem Practice. Use programmed booklets and readings for independent study on merchandising theory. The final test on Module I will be taken with the class as listed in the course outline. Attendance in class on days guest speakers are invited is mandatory.

Option IV: Do the entire course by independent study, i.e., combine Options II and III. Attendance in class on days guest speakers are invited is mandatory.

PLEASE NOTE THAT THURSDAY JANUARY 23 is a THEORY SESSION.

Indicate the option that you have chosen and pick up your worksheets in 311 before Friday noon, January 24th.

You will again be given the opportunity to take one make-up test in order to reach the 80% competency level desired for this course. The dates of these tests will be announced as the term progresses. All competencies have been listed and tests will be based on these.

The application and synthesis of the principles of merchandising will be demonstrated and evaluated by your project. The criteria for these are also listed. Two papers, one combining Modules I and II and another combining Modules III and IV will be due on the dates indicated in the Course Sequence. Please be concise, limit your papers to the material requested and do not duplicate the textbook. THE PROJECT IS REQUIRED REGARDLESS OF WHICH OPTION YOU CHOOSE.

Much of this planning proved to be a waste of time as only two students chose to try to test out of Module I; one succeeded, the other didn't. None tried in any of the other modules. Two chose to study Module I independently. The word "officially" is used advisedly, meaning that the students declared themselves to be studying independently and came for additional materials. The initial instructions for options apparently were not referred back to by the students nor were they reinforced in class sufficiently to become operational. On the other hand, it may be that students preferred to follow Option I, after considering other alternatives. This issue was not clearly addressed in the OMNIQUEST.

The staff then developed the competency statements for the content area of merchandising using the program translation method. The traditional course outline is included in Appendix A. The competency statements developed are also displayed in Appendix A.

Validation of Competencies in Merchandising Component

The merchandising competencies developed at Syracuse were validated locally and statewide by a group of 23 reactors including New York State distributive education teachers, public school administrators, students and businessmen who evaluated the competencies as to their importance to future distributive education teachers. These reactors were members of the Advisory Committee and Council of Distributive Education Teachers, described in detail in Appendix B. They used a questionnaire rating the competencies as either, essential, important, of limited value or unimportant, to DE teachers on the job. Only 12 of the 77 sub-competency statements were checked as unimportant, 10 of them in Mod I.

These were all checked by the same person. There was a scattering of items considered "of limited value, but could be included." Six people, or 25% of the respondents considered #2.19 in this category. It reads "Describing patterns of responsibility for merchandise budgeting in various types of retail institutions." Five people considered #1.132 also in this category. This was "Listing advantages and disadvantages of different methods of accounting control." Far and away the majority of the competencies were considered essential or important. No additional competencies were suggested. The rating of this group provides validity for the merchandising at the local and New York State level.

A comparison of the competencies developed by the program translation method for the S.U. merchandising component with the Crawford competencies (Crawford, 1968) helped validate the S.U. results. The process was similar to that for competencies in the retailing component and is discussed in that section.

Student Evaluation of Competency-Based Merchandising Components

An OMNIQUEST form similar to the one used for the evaluation of the Retailing component was used for student evaluation of Merchandising 276. A copy of the form is included in Appendix C.

Course directions: When asked about the clarity of directions for the course, other than the 12% who thought the directions were inadequate, the group was about evenly divided between feeling they were "clear and comprehensive" or "fairly clear but missing important elements." The main problem expressed when given the opportunity to be specific about improving the directions for the course related to directions for the project. Some implied that extra instructions were needed for those who had not taken the previous course or written a paper previously for the instructor. The suggestion was made that a sample paper be available. The overall rating on directions was much better for this course than the fall one. The mean rating was 1.71 for the merchandising compared to 2.19 for the retailing. (Ratings were scored 1-4 from highest to lowest.) Forty-one percent of the students rated the merchandising directions "very clear and comprehensive" compared to 17 percent who gave the retailing directions such a high rating.

Course load: Approximately one-third of the class felt that the course-load was "just right," almost 60% felt it was "heavy" and 9% "very excessive." The project was rated "difficult but worth the effort" by 53% of the students, "too hard and too confusing" by 37%. In general, this course was considered more difficult by the students than retailing, the mean score on this item was 2.35 compared to 2.00 for the earlier course. Only 6% of the students found it highly rewarding compared to 17% in the earlier course. About a quarter of the group would have preferred to have the project as one assignment at the end of the course.

Class, text and tests: About 70% of the class found the lecture groups moderately effective or better, and the class meetings interesting. The class was about equally divided in finding the textbook Duncan "very beneficial" or "adequate." Almost 70% found the NRMA Merchandising Arithmetic text "very beneficial," 24% "adequate." Eighty percent of the group found the tests "very fair; well matched with what was taught or required." Only one student rated them as low as "somewhat unfair." In general the tests were viewed more favorably in the Merchandising than the Retailing class, which is not unexpected due to the specific nature of computational problems compared to multiple choice questions. The mean score was 1.24 compared to 1.78.

Grading: The students were almost equally divided in rating the grading procedures either "excellent" or "good." Half the class reported that materials were rarely available when they needed them. This was a library problem that has not been entirely resolved. It may have been that students used the programmed booklets for review, and the number available was not sufficient for mass usage.

Availability of instructional assistance: Sixty-seven percent found the opportunity to meet with the principal instructor good to excellent, 86% found the teaching assistants available to this extent.

General: "All things considered," about three-quarters of the students responding to the OMNIQUEST rated the course "good." About half of the remaining students rated it "excellent," the other half rated it "fair." About 80% of the students said they would take more courses designed this way, and a similar 80% felt it was an advantage to take quiz on theory and computation before doing their project. Eighty percent of the students rated the make-up tests as a great deal of benefit. In answering the question as to how the course format could be improved, the main suggestion was for improvement in directions for the project. Several suggested a smaller class size. Fourteen percent found the course to be "always" an enjoyable experience, 57% found this to be true "frequently" and 29% "occasionally." On the whole, however, 70% of the class thought they had learned a great deal, about 30% felt they had learned some, and none admitted to learning "not very much." Responses to the question about what was the most valuable thing about the course, tended to be very generally about basic understanding and learning math. No clear pattern emerged either from responses to what was least valuable. There was some indication that the class period of 1 1/2 hours was too long. Only 16 students mentioned any topic they would like to have included that was not covered, and two of these would have liked more detail on buying.

Student Evaluation of Independent Study Materials: The merchandise math booklets were made available for independent study options in particular, but were available for any student use. About one-fifth of those responding to the OMNIQUEST indicated that they did not use the programmed booklets. Seventy-three percent of those who reported using them found them "very clear and comprehensive." Twenty-one percent found them "fairly clear," and only 6% found them "inadequate."

In addition to the one general question on the OMNIQUEST, a separate evaluation on the programmed booklets was used. A copy is included in Appendix C. The time spent on any one booklet varied from one half hour to six hours. There didn't seem to be any relationship between the grades of those students and the time they spent on the booklets. A summary of the use pattern of the booklets is displayed in Table 3.

Table 3

USE PATTERN OF PROGRAMMED BOOKLETS IN MERCHANDISING (N=43)

Pattern of Booklet Use	Booklet Titles							
	Profit & Loss Statements		Inventory Calculations		Buying Plans		Pricing and Terms Sales	
	No.	%	No.	%	No.	%	No.	%
Addition to class	25	57	24	56	17	40	13	30
Independent Study	1	2	3	7	2	4	2	5
Review <u>only</u>	11	26	9	21	10	23	4	9
Not used	6	14	7	16	14	33	24	56

This questionnaire indicated that as the semester proceeded fewer and fewer students used the programmed booklets, so that less than one-half the group used booklet IV. The majority of those who used the booklets used them in addition to class. However, close to one-third of those who did use the booklets used them for review only. The reasons for this use pattern were not determined. However Module I seemed to be more difficult, judging from the larger number of students that took makeups compared to Mod IV.

C. Competency Basing and Implementing the Cooperative Work Experience Component

The following description of the traditional cooperative fieldwork component at Syracuse University is provided by the instructor, Charlotte Raphaelson.

* * * * *

1. Description of Traditional Syracuse Format

Preliminary to providing a description of the traditional format of the Cooperative Field Work component involved in this research project, the following should be pointed out:

- 1) In its original design, Cooperative Field Work was for Retailing majors only.
- 2) The Cooperative Field Work program was developed by this instructor, drawing on personal experiences, and studies from:
 - a) the organization of Cooperative Occupational Education programs at secondary level,¹
 - b) the concepts and precepts of the Cooperative Education Association (Cooperative Education, 1970).²

Because of the program's successful acceptance by the Syracuse merchants and the meaningful experiences which were provided for students, it was felt that the

¹ Rutgers, The State University of New Jersey, the Graduate School; Supervision of Distributive Education student while employed by Bamberger's New Jersey.

² Also interviews at Rochester Institute of Technology, 1970, with Miss Katherine Hartfelder, Placement Director of Cooperative Field Work, and Mr. Gary Brockway, Instructor.

program could also be used as a successful occupational experience for Distributive Education majors.³

Having established this background, the program description follows:

The objectives of the Cooperative Field Work experience are:

- a) to make classroom study more relevant to the vocationally oriented college student,
- b) to bridge the gap from the classroom to the real world of work,
- c) to allow students the opportunity to decide, after working in a business institution, whether or not their career goals should be reconsidered,
- d) to place students in positions where the most and best potential training could be obtained,
- e) to place students with previous experience in low and mid-management positions for optimum training,
- f) to fulfill 300 hours of full time employment.

The program is not typical of the work study sequences in large cooperative universities, since it involves half of one semester as the only required field period, and only during the junior or senior year. It is designed only for the Retailing and Distributive Education majors. Field work is a requirement for all Retailing and Distributive Education majors. However, Retailing majors have the option of fulfilling this requirement by securing a curriculum related position on their own during summer months, working full time for a minimum of 300 hours. Although summer employment is not supervised by the university, the instructor does require performance evaluation from the employer. Forms are provided by the instructor. The student must also present a paper based on the experience during the following semester. The college supervised work experience is required of all Distributive Education majors prior to the student teaching experience. The program is referred to by the university as a professional semester. It consists of the following:

- a) First seven weeks --- Up to 12 hours of intensified academic work may be elected.
- b) Second eight weeks -- Coop-Field Work - Full time employment in a Syracuse area retail store. Work experience extends into Christmas vacation. The student is committed to this employment through December 24th. 6 credit hours are earned.
- c) Seminar ----- One night, 2 hours per week during the work block. 1 credit hour earned.

³Temporary approval awarded by the New York State Education Department. All new programs at the time of submitting, were mandated to be competency based, 1972.

Objectives of the seminar:

- 1) To learn how different stores operate through mutual discussion
- 2) To air out "on the job" problems, and to make suggestions for handling them
- 3) To discuss human relations and attitudes in business
- 4) To provide a convenient opportunity for private consultation with the instructor before or after the seminar.

The student keeps an informal diary of the week's activities and gives it to the instructor at the seminar. The notes are returned to the student at the last seminar to assist the student in writing the final paper on the work experience.

A total of up to 19 credit hours may be earned during the professional seminar (16 hours is an average load). The coordinator reserves the right to refuse admission to the program if there is doubt that the student will be able to fulfill all criteria or is on probation.

The student will not be selected for Coop-Field Work until after both the Retailing and Merchandising program components have been completed.

The procedure for job placement is as follows:

Each spring, students are interviewed for the fall program and fill out applications. After interviewing the student, the educator-coordinator tries in every case to place the trainee in the store of his choice. Human relationships are very important here, as some students will relate in different ways to a large store, a specialty shop, or branch store. The stores are interviewed in early September to see what positions will be available beyond our usual seasonal placement. The student application is sent to the store. The student calls and makes his own appointment for an interview. Students are given guidelines by the College to follow while on the job. The educator-coordinator is in close touch with the store as well as the student at all times. There are at least four observations on the site by the coordinator. A letter is sent to each executive mid-way during the program.

Evaluation of the student and the program include:

1. Observations by the educator-coordinator,
2. Observations of store personnel; two evaluation forms are filled out by the supervisor at the end of the work block; filled out preferably with the student,
3. Student paper based on an outline presented at the beginning of the work block. The paper also includes an evaluation of the coop experience by the student,
4. An evaluation of the program by the business executive in charge of the program.

Copies of all forms used in both job placement and student evaluation procedures are included in Appendix E.

The professional semester takes place during the fall semester only, usually November and December, for several reasons. After interviewing and surveying the Syracuse area merchants and other schools having cooperative programs (Raphaelson, 1971), it was found that:

1. Placements are easier in the fall because budgets are higher due to anticipated seasonally higher business levels.
2. Opportunities to manage seasonal departments are available. Personnel are frequently receptive to placing responsible, knowledgeable students in these openings.
3. Management needs extra qualified assistance during this period.
4. Since it is the business time of the year, in a retail store, students are exposed to almost every possible retail business situation during their work block.

It has been said that executives would have more time to spend with trainees at a quieter time. Realistically, however, placements are much more difficult during other periods. Not only is this true, but as Stewart Collins says, "Cooperative Education is susceptible to business recession. A smaller choice of jobs reduces its educational potential" (Collins, 1973). The instructor has found that on-the-job training becomes much more involved at this time of year. The student is drawn into decision-making because of pressures of the season. Idealistically, it would be good to have an additional spring work block, but again, scheduling academic classes poses a serious problem.

Students are encouraged to work part-time and summers as much as possible, since experience is so important. However, the instructor, the educator-coordinator in this case, feels very strongly that casual part-time employment should not replace the full employment work-block period. Continuity on the job, without breaking for classes, allows the student to become completely involved. After the work block student has been placed in his or her assigned position in the store, and is actually on the job, the educator-coordinator introduces herself to the supervisor and presents a topical outline for use in training (illustrated in Appendix A).

Management changes from year to year in many of the stores and very often the current supervisor has never had a cooperative student. Very often, well meaning executives have not informed the immediate supervisor that their new employee is a college coop-student, and that the store has accepted certain training responsibilities. The educator-coordinator at this time goes over the entire program with the new supervisor for full understanding. A pamphlet published by the Cooperative Education Association is also left with the employer (Cooperative Education, 19). In almost all cases, this technique brings the supervisor into the education process and he usually will become most cooperative and responsible. Supervisors who have had coop-students before welcome new ones and are always interested to know about the progress of previous students. They take pride and satisfaction from their contribution to the training of future retailers and distributive education teachers.

The College for Human Development has been fortunate to have the cooperation of the Office of University Relations which has recognized the value of the cooperation of the area stores in this program, and has entertained store executives at receptions in recognition of their contributions to the students and to the program.

Since its inception, there have been numerous news releases and feature articles relating to the program in all Syracuse newspapers, the Alumni News and the University newspaper, "The Record." Publicity has been considered to be an important part of administering the Cooperative Field Work Program, as it affects community relations, and aids in student recruitment, in addition to giving broader visibility to the opportunities for professional training in the fields of retailing and distributive education.

* * * * *

2. Competency-Basing the Work-Experience Component

The staff found the cooperative work experience the most difficult to competency-base under the program translation method (Huston, 1972) because of the temptation to develop competencies in relation to students who had the most senior positions and the best job placements. There was a broad range in the number of competencies achieved by different students and opportunities afforded them in their training positions under the traditional format. It was not fair to penalize a student for failing to achieve a competency she did not have the chance to practice, nor to fail to differentiate between students who had similar opportunities but performed differently.

The staff started with the traditional "Trainee Job Description" included in Appendix A to begin the program translation process. It was decided to initially develop a detailed list of activities that were expected and desirable in the program rather than attempt to write objectives at this stage. It was then necessary to determine the competencies that it would be realistic to expect all students to achieve in their 300 hour work experience. Three steps were taken to accomplish this goal.

- 1) Student final papers in the traditional format included a job description of daily activities. These were analyzed by the researcher for reported activity participation to summarize the number of students that had participated in each of the activities listed. Any activity mentioned by a student not included on the staff-generated list mentioned above, was added to it. The college supervisor of the students for that term checked the summary and added any activity participation unreported by the students that she was aware of through seminar discussion, reading of daily logs or observation. Other than in the area of "returned merchandise" which was under-reported by the students, the supervisor judged the summary an accurate reflection of student on-the-job experience during that term. The list of activities and the percentage of students participating in each one is included in Appendix B.

- 2) The list of activities was presented for evaluation to the Advisory Committee, the Council of Distributive Education teachers and an additional group of Distributive Education teachers who were campus-participating in a graduate workshop. They were asked to rank the activities as to whether they were essential, important, of limited value or unimportant in the training of future Distributive Education teachers. The 46 responses received are reported in Appendix B.
- 3) A representative of a chain store and a representative of an independent department store on the Advisory Committee made a preliminary evaluation of the complete list of activities to indicate those that could be provided in their stores during the 300 hour period the students would be with them. Forty-two percent of the activities could be provided in both stores, 46% in one or the other and only seven activities could not be provided by either. These were: selecting merchandise for ads, checking copy and signs for release, security, setting sales quotas, computer set-up, calculating sales figures and commissions and vendor's presentation. The businessmen expected the students to observe the control and merchandising processes but not to be able to implement all of them.

With information from these three steps, a tentative list of activities to be performed by students during their cooperative work experience was compiled by the staff. With less than half of the total list of activities being available at the two stores sampled, some options had to be provided. It was decided to require activities that were a) available in both stores sampled, b) considered essential by reactors and c) participated in by more than 50 percent of the students during their 1974 experience.

A second category of activities was developed that included those a) considered essential or important by reactors, b) available in at least one of the sampled stores, and c) participated in by 10-50 percent of the students. It was estimated that one-half of these activities could be completed. At least two activities were required in each of the following areas: receiving, control/record keeping, merchandising and supervision.

A third category called "extra opportunities" included all those activities participated in by less than 10 percent of the 1974 student group. These activities were less readily available in the stores, but nonetheless desirable. It was estimated that all students would have the time and opportunity to participate in at least four such activities.

Altogether there were 17 required activities, 25 optional and 12 suggested extra opportunities. This classification of activities was modified slightly by the program director on the basis of student experience in other years. This produced a more accurate translation of her program expectations in the long run. For example, the "returned merchandise" and "responsibility for at least one display" activities were included in the required category

even though less than 50 percent of the students had participated in 1974. In the second category, several items, especially in the merchandising and record-keeping categories were added. These had been available in other years even though less than 10 percent of the 1974 student group had participated. Examples of these items were vendor's presentations, open-to-buy and classification merchandising. In the third category, more than the necessary 10 percent of the 1974 students had participated in some types of extra opportunities such as special events and figuring commissions, but these were not considered sufficiently important to place them in the second category.

The advisory committee had strongly advised the staff that any training plan or list of training activities be limited to one page to be most favorably received by business. The form illustrated in Table 4 was developed to list the activities for student training under the competency-based work-experience format. Interviews were set up with the managers of all the stores who cooperate in the work experience program and the program director personally went over this plan with them, soliciting any suggestions for improvement or change. The plan was very favorably received and all the managers agreed they would be capable of implementing it in their stores during the 1975 cooperative work experience period. They also agreed to permit the Distributive Education students to return to assist with inventory later in the year.

The competencies for the work experience component were then described by the staff from this activity base. This base was reflective of the expectations of the program and realistic in terms of accomplishment in all of the stores during the time period of the student work experience. The first 24 competencies were based directly on student performance during their work experience and the evaluation of these competencies was to be done by the immediate store supervisor following instructions included in Appendix A.

A second set of eight program competencies could not be demonstrated on the job, although the information was to be collected during the students' work experience. These competencies were to be demonstrated in writing to the college supervisor. The students were not expected to be actively involved in the entire receiving, control/record keeping, merchandising and supervision processes during their cooperative work experience. However, they were expected to be aware of them. In the traditional program, the students had been given a written assignment to "study a position or function in the store in which the student is not involved but in which he has an interest." This assignment was intended to demonstrate the student's understanding of some of these business processes. Most students described the position of buyer. In the competency-based format, a more direct description of the processes as they were applied in the store or department in which they worked was called for.

Students were expected to obtain this information from store personnel if they did not find it out from observations on the job. In the traditional program, students had also been asked to describe in writing, "the firm, its history, the goods and services it offers and the area it serves" and were expected to "discuss the business conditions, national and local during their employment period and evaluate these conditions on current business." Similar requirements were continued in the competency-based program.

GENERAL TRAINEE PLAN SHOWING COMPETENCY NUMBERS

Rating: E - Excellent
G - Good
F - Fair

II. Requested 50% (at least 2 in
each category
(23)

III. Suggested Extra Oppor-
tunities (Minimum four)
(24)

I. Required Program

* <u>SALES:</u> (1)-Customer service program . . .		RECEIV-	(17)-Receipt of goods process . . .	-Observe sales promotion	
(2)-Floor, mail, telephone and/ or catalog.		ING:	-Types of marking, coding. . .	procedures.	
(3)-Returned merchandise proc. . .			(18)-Distribution of goods. . . .	-Observe sales audit dept. . .	
(4)-Operate a cash register. . .		CONTROL	(19)-Basic stock contro.	-Observe purchase journal. . .	
(5)-Knowledge of merchandise . .		RECORD-	-Fashion control	-Visit distribution centers.	
(6)-Cash and charge procedures . .		KEEPING	-Computer printouts.	-Attend store meetings, i.e. buyers, advertising,	
			-Sign requisitions	operations.	
<u>STOCK:</u> (7)-Transfers			-Re-ticket merchandise	-Comparative shopping. . . .	
(8)-Markdowns-record keeping. . .			-Markdowns.	-Shopping employees	
(9)-Fill-ins - a)storage.		MER-	(20)-Write and extend orders. . .	-Special events	
b)other.		CHANDIS-	- Write special orders.	-Set sales quotas	
(10)-Counts-periodic or daily. . .		ING:	-On order file	-Figure commissions	
(11)-Put away and re-arrange merchandise.			-Buying/merchandising plan . .	-Annual inventory	
(12)-Housekeeping			-Open to buy.	-Other operational activi- ties, (i.e., restaurants,	
(13)-Loss prevention own area . .			-Vendors' presentations . . .	etc.).	
			-Merchandising process (i.e., markdowns, pricing, buying).		
<u>DIS-</u> (14)-Responsible for at least			-Classification/merchandising		
<u>PLAY:</u> one display, i.e., point of			-Visit parent suburban store.		
sale, window, other					
<u>SUPER-</u> (15)-Scheduling (part respon-		SUPER-	(22)-Cash registers-beyond own . .		
<u>VISION:</u> sibility)		VISION:	-Supplies - ordering.		
(16)-Merchandise information . .			-Customer service-beyond own . .		
			-Authorization responsibility.		
<u>INVEN-</u> (21)-Annual inventory			-Train new or seasonal per- sonnel (part responsibility).		
<u>TORY:</u> (D.E. majors only, later			-Loss prevention-beyond own . .		
date if necessary).			-Merchandise information for dept. (i.e., ads/tear sheets, catalogs, sales co-ordinate merchandise and signs) . . .		

*Competency Numbers

NOTE: This plan is based on records of what students have actually done on the job. It is hoped that each student trainee will have the MAXIMUM experience possible. All activities in the first column are required. At least 12 of items listed in second column (minimum of 2 each category) and four times in third column are requested. Minimum hours worked - 300. (1975 S.U. College of Human Development)

A third group of competencies dealt with required levels of performance in relation to 15 attributes/skills in the human relations and communications areas. The checklist used for evaluating student performance in these areas was developed by combining and modifying two of the forms used in the traditional Syracuse program shown in Appendix A and adding some attributes from the Syracuse Regional Learning Service, Bureau of Cooperative Educational Services and University of Rochester checklists. The new checklist appears on page 36.

A complete listing of the competencies developed for the cooperative field work experience in the fall of 1975 is given below.

- A. Students will be able to demonstrate at least 80% of the following competencies in a manner that will be judged at least "Good" by their supervisor: (Scale: Excellent, Good, Fair)
1. Demonstrate knowledge of store's customer service program in daily work experience.
 2. Sell merchandise or service in point of sale, mail and/or catalog situation.
 3. Follow established procedure for returned merchandise.
 4. Operate cash register and/or drawer and deal with opening, closing and balancing procedure.
 5. Relate merchandise knowledge to needs of customer, store or department.
 6. Apply cash and charge procedures to complete sales.
 7. Apply procedures for inter-departmental or branch/parent transfers.
 8. Apply markdown record keeping procedures.
 9. Maintain on-floor stock level from storage room/distribution center/other.
 10. Do periodic and/or daily merchandise count.
 11. Organize and arrange merchandise in accordance with needs of department.
 12. Apply housekeeping procedures.
 13. Follow store policy and procedures for loss prevention (shoplifting, clerical transactions and employee theft, etc.).
 14. Create at least one display (i.e., counter, window, point of sale).
 15. Schedule (at least in part) other store personnel.
 16. Relay merchandise information to subordinates.
 17. Apply at least one step in the receipt of goods process.
 18. Apply at least one step in distribution of goods process.
 19. Apply a minimum of two of the following types of stock/record keeping.
 1. Basic stock control
 2. Unit control
 3. Computer Printouts
 4. Write requisitions for signs, etc.
 5. Re-ticket merchandise
 6. Markdowns - Change price on tickets
 20. Apply a minimum of two of the following merchandise processes.
 1. Write and extend orders
 2. Write Special Orders
 3. On order file

4. Buying Plan
 5. Open to buy
 6. Vendors' Presentations
 7. Merchandising Decisions, e.g., markdowns, pricing, buying
 8. Classification Merchandising
 9. Visit parent/suburban store
21. D.E. student only: Apply at least 3 processes of an annual inventory.
 22. Supervise personnel in at least two of the following categories
 1. Cash registers - responsibility beyond own customer
 2. Supplies - ordering
 3. Customer Service - beyond own customer
 4. Authorization - responsibility
 5. Train new or seasonal personnel (part responsibility)
 6. Security-beyond own area
 7. Merchandise information for Dept., i.e., ads (tear sheets), catalogs, sales, etc.)
 23. Apply at least four additional processes in Receiving, Control/Record Keeping, Merchandising or Supervising listed in Comp. 18-22 for a total of 12 competencies in second column of training plan.
 24. Participate in a minimum of four special opportunities within the retail organization listed in column 3 of the training plan. (In some cases such as attendance at special events, only a sign-off on attendance and not a rating by supervisor is required.)*
 1. Observe advertising procedures
 2. Observe sales audit department
 3. Observe - Purchase Journal
 4. Attend store meeting

These competencies are to be evaluated by their immediate supervisor in the store on the following training plan with instructions attached.

- B. For the store or department in which they were employed, stating the source of information in each case, the student will be able to:
1. Describe in writing the receipt of goods process by including:
 - 1.1 Checking procedures (check against purchase order)
 - 1.2 Marking procedures (including an interpretation of ticket codes)
 - 1.3 Distribution of merchandise after marking
 - 1.4 Comment on appropriateness of process used for the goods you handle (1 point for a, b and c for listing only)
 2. Describe in writing methods used for stock control (basic and/or fashion, depending on department) by including:
 - 2.1 Description of the methods themselves
 - 2.2 How the information is used
 - 2.3 Comment on appropriateness of method for your department
 3. Describe in writing merchandising procedures and tools by including:

*See training plan on page 31 and instructions in Appendix A.

- 3.1 At least 11 of the following procedures and noting how they are used and who makes the decisions:

Price policy_____	Open-to-buy_____
Markon_____	Markdowns_____
Stock turnover_____	Shortages_____
Stock sales ratio_____	Gross margin_____
Percentage method_____	Buying plan_____
Planned sales_____	for market trip_____
Purchases at_____	Model stock plan_____
cost/retail_____	Basic stock plan_____
	Other_____

- 3.2 Comment on how at least four of the procedures related to the merchandising process
4. Analyze the advertising for your department by including:
- 4.1 A log of ads from the department
 - 4.2 A chart of sales for one item advertised for one week
 - 4.3 Comment on the effectiveness of the ad and document your analysis
5. Describe the development of your store's image from its first establishment to the present in a maximum of two pages including documentation by including:
- 5.1 The type of store and its present image
 - 5.2 Historical development
6. Describe and analyze the internal and external conditions that affected sales of your store during the period of your employment including:
- 6.1 Three specific examples of internal conditions
 - 6.2 Three specific examples of external conditions
 - 6.3 Analyze one internal condition in depth (document)
 - 6.4 Analyze one external condition in depth (document)
7. Interpret the significance of the four or more extra opportunities that were provided (see column 3 on training plan) by:
- 7.1 Citing all the opportunities
 - 7.2 Appropriately interpret the significance of four opportunities
8. D.E. students only: Describe the process of the annual physical inventory by including:
- 8.1 Outside personnel that administers physical inventory
 - 8.2 Method of in-store supervision and recording of physical inventory
 - 8.3 Identification of the method used (Cost or retail)

These competencies will be evaluated by instructor on scale illustrated in right hand column. (See Appendix E.)

- C. 1. The student will demonstrate the following human relations and communications skills/attributes on-the-job in a manner which will receive an average rating of 3, on a 5 point scale from both his immediate supervisor and the college coordinator.

1. Voice and speech
2. Appearance
3. Alertness
4. Ability to present ideas
5. Judgment
6. Self confidence
7. Friendliness
8. Responsibility
9. Peer relations
10. Reaction to authority
11. Leadership
12. Initiative
13. Adaptability
14. Reaction to managerial point of view
15. Personal fitness for job

2. The student will be able to realistically evaluate his/her own human relations and communications skills by rating his/her own performance so that their score on the following checklist does not vary from the coordinator's and supervisor's rating by more than one point on the average.

These competencies will be evaluated with the checklist illustrated in Table 5.

Following the development of the competencies, the cooperative work experience was implemented in a manner similar to that of the traditional program. Instead of using blank notebooks for their weekly logs, students were given sheets with the competencies listed down the left-hand side with space for the date performed, a description of the activity participated in, and comments. A sample sheet is included in Appendix A. The students personally delivered a copy of the "General Trainee Plan" shown earlier in the report to their immediate supervisors. A set of instructions for the supervisor's use, signed by the college coordinator was attached.

Later a complete list of the competencies for the program were given to the supervisors for their information. The students received the assignment of competencies that were to be reported in written form, and received copies of the checklists to be used in evaluating their performance in human relations and communications areas. A seminar once a week with the college coordinator assisted the students in meeting their competencies.

3. Validation of Competencies in Cooperative Fieldwork Component

A group of 46 people including New York State distributive education teachers, public school administrators, students and businessmen served as program reactors for the cooperative work experience. They evaluated the activities on which the competencies were based as to their importance to future distributive education teachers. A detailed summary of their evaluation is included in Appendix B. The only activity that more than 10 percent of the reactors felt was unimportant was "gift wrapping." The percentage of the group that judged the activities in the training plan as

TABLE 5

SYRACUSE UNIVERSITY
COLLEGE FOR HUMAN DEVELOPMENT
Evaluation of Student's Field Work Experience
Human Relations and Communication Skills

Name of Student _____ Name of Supervisor _____
Type of Work _____ Title _____
Length of time Student worked in your organization _____ Name of Organization _____

Please check most appropriate descriptions

1. Voice and Speech	Irritating and/or indistinct	Unpleasant and/or unclear	Adequate	Definitely pleasant	Exceptionally pleasant and/or clear
2. Appearance	Unacceptable or unsuitable	Creates rather unfavorable impression	Suitable/acceptable	Creates distinctly favorable impression	Very impressive
3. Alertness	Slow in grasping the obvious. Often misunderstands	Slow to understand subtle points	Usually grasps intent of questions	Quick in grasping questions and ideas	Exceptionally alert; quick to understand
4. Ability to present ideas	Illogical and/or confused	Logical ideas but presented in a somewhat disorganized way	Communicates ideas adequately	Above average ability to express ideas	Exceptionally logical, clear and convincing
5. Judgment	Acts impulsively without forethought	Shows some tendency to react impulsively	Acts judiciously in ordinary circumstances	Shows above average judgment in most circumstances	Inspires full confidence in all circumstances
6. Self-confidence	Timid, easily influenced	Overly self-conscious	Confident	Above average self-confidence	Exceptional self-confidence
7. Friendliness	Unfriendly, keeps at a distance	Does not easily attract friends	Approachable, likeable	Attracts friends easily	An inspirer of loyalty
8. Responsibility	Irresponsible	Sometimes responsible	Responsible	Shows better than average responsibility	Assumes responsibility in all situations
9. Peer relations	Uncooperative	Sometimes hard to work with	Cooperative	Works well with others	Exceptionally outgoing, pleasant and cooperative
10. Reaction to authority	Hostile	Indifferent	Accepting	Positive	Exceptionally cooperative
11. Leadership	Unable to lead	Prefers to follow	Shows leadership when requested	Voluntarily displays leadership	Seeks leadership; "Makes things go"
12. Initiative	Requires constant followup	Needs occasional prodding	Does routine assigned work	Sometimes seeks additional work	"Self-starter" always seeks and recognizes work to be done
13. Adaptability	Unable to adapt to new situations	Occasionally adapts to new situations	Adapts to new situations	Adapts well to new situations	Always adapts well to new situations
14. Reaction managerial point of view	Lacks understanding of managerial point of view	Limited understanding of managerial point of view	Aware of managerial point of view	Cooperates with managerial point of view	Actively supports managerial point of view
15. Personal fitness for job	Unsuited	Endorsed with hesitance	Endorsed	Endorsed with confidence	Endorsed with enthusiasm

Special Comments: (use back of page if necessary)

either important or essential is given in Table 6. The percentages are very high overall. The fact that about one-third of the group considered cash register operation and counts less than important is hard to explain unless they assumed that most students would already know this and additional training was of limited value. Also, the actual activity relating to cash register operation was on the list under "supervision of cash registers other than one's own," which may account for the lower percentage. One limitation in validation was the inability of the program to reflect the high percentages of the group that felt that most of the merchandising processes and control/record keeping activities should be implemented by the students and not merely observed. The best that could be done in the program within the constraints of time and accessibility to these processes in the stores was to require the implementation of at least two activities in each of these categories. Students were encouraged to implement as many as possible. No additional activities were suggested by the group of reactors. Their ratings provide validity at the local and New York State level.

A comparison of the competencies developed by the program translation method for the S.U. cooperative fieldwork component with the technical objectives developed by Lucy Crawford (Crawford, 1968) helped validate the S.U. results at the national level. A combination of the competencies in the three S.U. components of retailing, merchandising and cooperative fieldwork addressed all the terminal objectives in the Crawford study with few exceptions. In the operations and management area, three objectives relating to the formal training or hiring of other employees were not included. The high level objectives in the merchandising area which included responsibility for pricing and buying merchandise are not achieved in the Syracuse cooperative fieldwork experience. The students do not have responsibility for hiring or evaluating personnel, although they become aware of the processes indirectly through their own experiences.

Validation of the competencies in the S.U. cooperative fieldwork experience for retailing majors which is not a concern of this study, could be tested by a comparison with the specific objectives for student work experiences developed by Kathryn Greenwood in her 1972 doctoral dissertation "Systematic Approach to the Evaluation of a Fashion Merchandising Program with Guidelines for Student Work Experiences" (Greenwood, 1972).

Student Evaluation of Competency-Based Cooperative Work Experience Component

An OMNIQUEST form similar to the one used for the evaluation of the Retailing and Merchandising components was used for student evaluation of the cooperative work experience. A copy of the form is included in Appendix C.

The students participating in the cooperative work experience were all Retailing majors and/or Distributive Education majors in the first semester of their senior year. "All things considered" the entire group rated the cooperative work experience as good or better, 62 percent rated it excellent. Almost 90 percent agreed that they had learned a great deal. The competency statements were rated as "clear and comprehensive" by three-quarters of the group, the rest found them fairly clear but missing important elements. One student found the work load heavy, the coop experience only occasionally

Table 6

PERCENTAGE OF ADVISORY COMMITTEE AND DISTRIBUTIVE EDUCATION TEACHERS
JUDGING TRAINEE ACTIVITIES IMPORTANT OR ESSENTIAL

I. <u>Required Program</u>		II. <u>Requested 50% (at least 2 in each category)</u>		III. <u>Suggested Extra Oppor- tunity (minimum four)</u>	
1-Customer service program. .*	100	1-Receipt of goods process.	89	1-Observe sales promotion procedures.	--
2-Floor, mail, telephone and/ or catalog.	100	2-Types of marking, coding.	--	2-Observe sales audit dept .	84
3-Returned merchandise proc.	78	3-Distribution of goods. .	89	3-Observe purchase journal. .	73
4-Operate a cash register . .	64	4-Basic stock control. . .	98	4-Visit distribution centers.	100
5-Knowledge of merchand. . .	100	5-Fashion control.	96	5-Attend store meetings, i.e. buyers, advertising, operations.	96
6-Cash and charge procedure .*	100	6-Computer printouts . . .	80	6-Comparative shopping. . . .	93
7-Transfers	76	7-Sign requisitions. . . .	61	7-Shopping employees.	87
8-Markdowns-record keeping. .	91	8-Re-ticket requisitions .	78	8-Special events.	96
9-Fill-ins-a)storage.	76	9-Markdowns.	91	9-Set sales quotas.	89
b)other	76	10-Write and extend orders.	69	10-Figure commissions.	89
10-Counts-periodic or daily. .	64	11-Write special orders . .	74	11-Annual inventory.	96
11-Put away and re-arrange merchandise	84	12-On order file.	80	12-Other operational activi- ties (i.e. restaurants, etc.	--
12-Housekeeping.	96	13-Buying/merchandising plan	96		
13-Loss prevention own area. .	84	14-Open to buy.	--		
14-Responsible for at least one display, i.e. point of sale, window, other. . .	98	15-Vendors' presentations .	89		
15-Scheduling (part respon- sibility)	84	16-Merchandising process (i.e., markdowns, pricing, buying).	93		
16-Merchandise information . .	91	17-Classification/merchan- dising	--		
17-Annual inventory (D.E. majors only, later date if necessary)	96	18-Visit parent suburban store.	84		
		19-Cash registers-beyond own	64		
		20-Supplies-ordering. . . .	67		
		21-Customer service-beyond own.	78		
		22-Authorization responsib.	64		
		23-Train new or seasonal personnel (part respons.)	96		
		24-Loss prevention-beyond own.	89		
		25-Merchandise information for dept. (i.e. ads/tear sheets, catalogs, sales co- ordinate merchand. and signs.	89		

*Not included in activity list; considered same as sales.

enjoyable, the fairness of the evaluation procedure only fair. With this exception, the group found the work load just right; 20 percent finding it rather light. Evaluation procedures were rated fair or excellent, the cooperative experience was rated "frequently" or "always" enjoyable. The self-evaluation process was rated good to excellent in relation to the student's professional growth except in the case of one student. Twenty-five percent of the group found their paper highly rewarding, 62 percent found it difficult but worth the effort and 12 percent or two students found it "a real waste of my time." The Wednesday night seminars were rated "very interesting" by two students, the rest were equally divided between finding it interesting and dull. Half the class judged it moderately effective, the rest, minimally effective and two students rated it a waste of time. The students felt the adequacy of the opportunity to meet directly with both their store supervisors and principal instructor was good to excellent, with one exception.

In response to the open-ended questions about what was most valuable in the course, least valuable and how to improve the cooperative work experience, the students were most enthusiastic about the store experience and least enthusiastic about the Wednesday seminars. Some expressed a concern about the proportion of their time spent with sales work. A mid-way evaluation was suggested.

Store Executive's Evaluation of Competency-Based Cooperative Work Experience

Five executives out of a possible six from retail institutions cooperating in the Syracuse program responded to a short questionnaire evaluating the program. Two rated the program excellent, three rated it good. Despite assurances of anonymity, only one executive rated the faculty advisor on administration of the program or supervision of students on the job. That one rated her excellent. Three of the four executives who rated student attitudes found them excellent or good. It was suggested that when in a supervisory capacity, more is expected of them than in other roles. Two rated student subject matter preparation. One rated it as excellent, the other said more was needed. The same two rated the training plan and evaluation materials, agreeing that they were very good, but not extensive enough. Program evaluation by the student's immediate supervisors in addition to store executives would be a valuable addition for program planning.

Instructor Evaluation of Development and Implementation of Syracuse University Competency-Based Cooperative Fieldwork Component

Several issues which are found elsewhere in the report are re-stated here by the instructor since they have direct relationship to the instructor's viewpoint.

1. The instructor or Educator-Coordinator of the Cooperative Fieldwork Program is:
 - a) the same person who developed the traditional program. Four years were spent in building relationships with the business community by all the prescribed methods in Occupational Cooperative Education.
 - b) the same person who has taught both the traditional method and the competency method except for the fall of 1974 when it was carried on by a graduate assistant under the direction of this instructor.
2. All but two students in the competency-based cooperative program had participated in the competency modules included previously in this report under Retailing 275, Retailing 276; therefore, they were familiar with the format.
3. Students were placed in six businesses but in multiple stores so actually there were four downtown locations and four shopping center locations. A summary of the 1975 placements is given in Table 7. Of the eight stores used, only three had full merchandising and operation facilities available. Three branch stores made their merchandising division available to the students. At first glance at the recap of where student placements were, one could conclude that there should not be too many variables, since we were dealing with stores that were accustomed to the program. However, certain variables did occur.

Major variables which can recur are:

1. Lack of communication between management and supervisor identifying the new employee as a coop trainee. This frequently happens in the best of circumstances.
2. Change in the store personnel; need for complete re-education.
3. Businesses with excellent training potential not realizing the full value of cooperative education.

During this fifth year of the Cooperative Fieldwork Program, the competency based experimental group did have to work with these same problems.

Table 7

COOPERATIVE FIELDWORK STUDENT PLACEMENTS IN SYRACUSE
AREA STORES 1975, CLASSIFIED BY TYPE OF STORE
AND NUMBER OF YEARS IN PROGRAM (N=18)

Type of Store	Location			
	Downtown		Shopping Center	
	Years in Program	No. Students	Years in Program	No. Students
Junior Department			4	1
Parent Department	4	4		
Branch Department	4	3		4 (2 stores)
Specialty	3	2		
Specialty Chain	4	2		
Chain			2	2

Competency helped to a great degree but not as much in the communications factor as this instructor would have hoped. Students did complete, either by working on the job, observing on the job, and interviewing on the job more competencies than reported before. Students probably had the same opportunities in the traditional mode but since there was no objective outline to write to, the instructor could not know exactly all the student had learned.

The instructor followed the same procedures for placement as the traditional program with the following exceptions. In August she visited each store executive to make sure the business would agree to the training plan. All agreed that there would be no problems in following the plan and agreed to cooperate. One personnel director was enthusiastic feeling that this would be of great assistance to their buyers in helping with the training. It was a much more objective document than previously used. The others accepted and felt it would be useful. All asked that the materials be mailed to them for distribution.

After the student was in the permanent assignment, the instructor met with the individual supervisors. Some had not received their training plans and had not been told about them. Again, this was anticipated as stated earlier in this section. The instructor again explained the process and in all but three cases felt there would be few problems.

The three problem-predicted cases proved to be accurate. The students did have a good experience in spite of it; we hope for optimum, however, and not just good.

When this instructor conducted surveys at 26 colleges prior to the establishment of the traditional programs, there were many comments made. Perhaps the best one that sums it all up was returned by Simmons College, Boston, Massachusetts (Raphaelson, 1971, Appendix p. 82).

We like to think our F.M. program is always open to change since we never are completely satisfied with present arrangements. Our two continuing problems are: (1) structuring the field work experience so the student has enough responsibility for decision making, so the assignment is a challenge to a college senior; and not simply physically exhausting, and (2) to get a meaningful evaluation of the student's performance.

Setting down performance goals can be a means to overcome these problems. The traditional program achieved these goals to a great degree through constant visitation and consultation. However, by structuring the training plan so that not only performance goals could be achieved, the student could use the business as a learning laboratory and observe, ask questions and complete competencies through on-the-job experience. Certainly a field centered experience exceeds far beyond the project method in the classroom. The educator-coordinator continued, however, with the traditional visitations on-the-job to make sure the training plan was being followed. Students had no problem completing the required column and many achieved beyond the minimum requirements of the other two columns.

Because of the variables mentioned earlier in this section the instructor still had to prod several managers or supervisors, including the three cases that were expected. Businesses committed to the plan carried it out. However, even here, there was again a human failing, that of leaving things to the last moment. Formal journals, comprised of the competencies, replaced the informal diaries of the traditional program. The instructor read the students' journals on a weekly basis. She made suggestions at the next visitation or the next seminar that trainees should take the initiative with their supervisors to complete more competencies on how to solve other problems not related orally during the seminar. Students were asked to do their self-evaluations early in the program so that they could look at them toward the end of the work block and try to evaluate their own growth. Few did this.

During the last two weeks, spurred on by a letter from the instructor, most managers saw that their trainees completed as much of the training plan as possible. Supervisors had been given, along with the training plan, the students' guidelines, the competencies needed for their report, and a human relations and attitudes evaluation chart. Although they did use them during the eight weeks, when it came time to evaluate the students many were lost.

The instructor realizes that this program is quite unique. Most colleges do not have the luxury of being able to place their students near campus and to have constant contact with the business and the student. The optimum does

occur in many cases, it does not occur in all. J. Dudley Dawson points out the following must exist for the best results (Dawson, 1975):

- . Resourcefulness of the student
- . Nature of the job and the work environment
- . Quality and interest of the work supervisor
- . Functioning of the cooperative education coordinator
- . Student motivation from the teaching and advising faculty
- . Presence of expectations for educational outcomes
- . Follow-up with students and with employers
- . Evaluation of the educational results.

In his article he makes many of the same points made in this report. It is not common to have all of the eight conditions exist at one time. He also goes on to say that care should be taken not to give complicated "detailed learning objectives" to employers, since they do not have time to get so involved. This was the very reason the research team decided to use abbreviated terms on a one-page training plan for the employer. They did, however, correlate exactly to the students' copy of competencies expected. Dr. Dawson also states in this article that Marketing is one of the few fields where objectives can be stated and followed in a cooperative situation and one similar to the one at Syracuse University--that of close contact with the business and the school.

For those students with well defined career objectives, specific learning objectives can be made readily defined. Therefore the instructor feels that the program as conceived by Syracuse University has proceeded along well defined lines, as stated in Dr. Dawson's paper, including the areas of learning applicable skills; the attitudinal learning as reflected in the Human Relations chart; and the cognitive area through which the students can relate their class work to their on-the-job experiences. His guidelines for "observation, reflection and evaluation of Coop Education experiences" are open ended questions which are used with the employer's evaluation for grading purposes (Dawson, 1975).

The article was encouraging for the use of competency basing a work experience and does express the need for documentation and research in evaluation of the attitudinal areas. This instructor feels that the competency program has kept most of the current practices in Cooperative Education allowing for initiative on the part of the student. It has added a new dimension in the Cooperative approach.

The instructor, on a number of occasions, in explaining the competency based program to business executives and supervisors used the term, Management by Objectives. MBO, as it is commonly referred to in business, is

simply a system under which people involved with the management of a program sit down at the beginning of each time period and talk until agreement upon specific

goals is reached. Wide latitude in choice of method of reaching the goals is created. At the end of the time period actual results are jointly reviewed against agreed-upon goals and an assessment of the degree of the success is made. This process is then begun for a new time period. This describes the goal setting or objective setting process which is the commonest forms of MBO (Downing, 1974).

This is one of many definitions of MBO. What is important is that most businesses today are MBO oriented. It is this instructor's feeling that the tendency for Distributive Education Coordinators to be wary of training plans would disappear if this approach was used. Training plans at secondary level are needed to protect the student-trainee as well as to insure the educational process. At post-secondary level, if left simple and direct, using the MBO approach, the process in Cooperative Education becomes more meaningful to the business person, since he can immediately identify with it.

This viewpoint is reiterated by Dennis J. Sutherland in an article entitled, "Management by Objectives in Retailing." He discusses in this paper how job descriptions prepared by MBO can affect every aspect of the business from Supervisory Goals, Employer Evaluations, Coordination Goals, (merchandising and operations) Competitive Goals, Administrative Goals, Communications and Budget Performance. He makes an important statement: "Each job description, while describing the expectations and decision limits of the position, does not limit the persons filling the position from utilizing creative ability" (Sutherland, 1971).

The instructor of the competency based program was concerned about limiting the students' creativity because of the very definite criteria which had been developed. The Competency Mode in education is a new approach and it does take getting used to. However, it was discovered that students did not vary in their degree of adaptability or initiative from previous years as this instructor originally felt before evaluating their final papers. They were realized through their journals, where they expressed themselves weekly. The column on extra activities helped to achieve beyond minimum competencies. Some of the final papers went well beyond the minimum requested competencies and were exciting to read. In summing up, the student was helped to reach competency by all the materials developed. Those students who usually demand more of themselves still went beyond the minimum competencies required.

The seminar conducted once a week on campus did not vary with the traditional mode except that the journals were used as a vehicle for discussion after they had been read by the instructor. Again similar variables existed as in previous years:

1. The student who does not participate in the discussion and the one who attempts to monopolize it
2. The student who discusses and shares information freely
3. The student who is exuberant about his or her placement

4. The student who thinks, after hearing other experiences, that their placement is not as good as others
5. The student who is not taking any initiative toward his or her own training
6. The student who is negative in his or her feelings, instead of being constructive.

Fortunately for this instructor there was a mix of types of students. There were those who shared experiences more than others. Even though some students did not actively participate, it is felt that all benefited by sharing the discussions of the experiences of others, if not immediately, certainly in retrospect.

The instructor did introduce some formalized instruction in the field of human relations and attitudes and did relate them to situations found on-the-job. The seminar, though perhaps tiring after a day's work, serves the important purpose of keeping the student in the educational process. The instructor is able to talk more freely there during observations. There is no question in the instructor's mind, bolstered by student input during the seminar, that learning to work with subordinates, peers and supervisors was one of the most important aspects of the cooperative work experience. This exposure, in this type of situation, was felt to be a significant asset, compared to waiting until after the completion of formal education, and subsequently obtaining employment or teaching. Students stressed this repeatedly. This experience existed in both modes.

From the educator-coordinator's point of view, the following suggestions can be made for further implementation of the competency field work program:

1. Continuation of building understanding with cooperating businesses
2. Further research into methods of employer evaluation of student trainees
3. Visits with employer supervisors toward the end of the program and providing of duplicate evaluation forms
4. Additional open ended questions for the employer who found some frustrations in checking the boxed human relations form. Many did write comments. Several asked for conferences with the instructor so that they could evaluate the student honestly and constructively
5. Self-rating of students at the beginning of the program
6. More structuring of the seminar to encourage greater discussion by the students of the human relations and attitudes encountered in their work experience.

* * * * *

D. Developing Assessment Procedures for Competency-Based
Retailing and Merchandising Components

Once the competencies have been developed and the learning sequence format designed and implemented, assessment procedures had to be developed to measure the competencies. As many specific elements of the traditional assessment techniques as possible were retained to assist in the comparison between the two modes.

Retailing Component:

The assessment procedures developed for the Retailing component were of a traditional nature with the exception of those used on the Research Module which have been described earlier in this report. A program to computerize the grading system for this module is being developed. It proved very time consuming to do by hand, but it is important that each student have a different set of questions for the unit to be effective.

The competencies for the retailing component were weighted by the instructor as to their relative importance and a table of specifications for the multiple choice items was carefully developed. The details are given in Table 8.

A similar format had been used the previous year under the traditional format for testing principles of retailing, but the 82 items were given in two separate tests spaced out over the semester. But no makeups were permitted. Under the competency-based format, Mods 1-3 were combined in a 25 item test, and 10 items were constructed for each of the other modules and were given at the end of the lecture-discussion sessions for each module before students proceeded to application of these principles in their projects. Mods 1-3 were combined because both 1 and 3 were necessary to do the first part of the project, and Mod 2 was primarily tested by the library research assignment which was assessed on a pass-fail basis.

A comparison of the tables of specifications and method of grouping test items in the two formats is illustrated in Table 9.

The competency based format permitted two makeups in the competency based format although it was found that only two or three students requested a second one. The makeups were built following the same table of specifications as the original test. The first makeups for Mods 1-3 and Mod 4 were in completion form. This was mainly due to the pressure of time. The students found these more difficult and the rest of the makeups were in multiple choice format.

Due to the fact that the competency-based components remain in a traditional institutional framework it was necessary to translate measurement of competency achievement to grades. The following somewhat arbitrary procedures were used. The multiple choice test made up 40 percent of the student grades. Minimum competency on the first test was 14/25 points, 6/10 points on each of the others. If students did not reach this level they were requested to repeat the test. The translation to grade points including this minimum distribution was as follows:

Table 8

TABLE OF SPECIFICATIONS COMPETENCY-BASED RETAILING 275

MOD I		MOD II & III		MOD IV		MOD V		MOD VI		MOD VII		MOD VIII	
Ques. No.	Compe- tency	Ques. No.	Compe- tency	Ques. No.	Compe- tency	Ques. No.	Compe- tency	Ques. No.	Compe- tency	Ques. No.	Compe- tency	Ques. No.	Compe- tency
1	1.11	16	2.6	1	4.11	1	5.12	1	6.23	1	7.22	1	8.21
2	1.12	17	3.11	2	4.11	2	5.13	2	6.41	2	7.11	2	8.13
3	1.13	18	3.12	3	4.12	3	5.14	3	6.49	3	7.25	3	8.24
4	1.13	19	3.14	4	4.13	4	5.22	4	6.24	4	7.27	4	8.12
5	1.14	20	3.16	5	4.21	5	5.23	5	6.48	5	7.14	5	8.21
6	1.21	21	3.2	6	4.24	6	5.24	6	6.29	6	7.24	6	8.11
7	1.21	22	3.3	7	4.25	7	5.25	7	6.45	7	7.15	7	8.23
25	1.21	23	3.3	8	4.26	8	5.21	8	6.28	8	7.23	8	8.22
8	1.22	24	3.4	9	4.33	9	5.17	9	6.22	9	7.12	9	8.23
9	1.23			10	4.34	10	5.15	10	6.27	10	7.13	10	8.13
10	1.23												
11	1.24												
12	1.31												
13	1.33												
14	1.34												
15	1.4												

Table 9

COMPARISON OF TABLE OF SPECIFICATIONS FOR MULTIPLE CHOICE
TESTS IN COMPETENCY-BASED AND TRADITIONAL
MODES FOR RETAILING 275

Competency Number	Competency-Based			Traditional		
	Item Grouping	No. of Questions	Percent Questions	Item Grouping	No. of Questions	Percent Questions
1.1	MOD I - III	6	8	Test 1	4	5
1.2		6	8		6	7
1.3		3	4		0	0
1.4		1	1		1	1
2.1-6		1	1		0	0
3.1		4	5		0	0
3.2	MOD IV	1	1	Test 2	0	0
3.3		2	3		0	0
3.4		1	1		0	0
4.1		4	5		5	6
4.2		4	5		2	2
4.3		2	3		2	2
5.1	MOD V	5	7	Test 3	8	10
5.2		5	7		8	10
6.1	MOD VI	0	0		1	1
6.2		6	8		10	12
6.3		0*	0*		1	1
6.4		4	5		8	10
7.1	MOD VII	5	7	Test 3	3	4
7.2		5	7		8	10
8.3	MOD VIII	4	5	Other	7	9
8.4		6	8		6	7
					1	1
Total		75	99%		82	99%

*Tested in final project. Related to budget.

85% of 75 questions - 64 points A
 75% of 75 questions - 56 points B
 65% of 75 questions - 49 points C
 59% of 75 questions - 44 points C

The application competencies were evaluated by a project in which each student was to design his own retail business and apply the principles of re-tailing appropriately in its establishment. In addition to the stated competencies, the students received criteria sheets which spelled out the competency level required for a grade of B which was described as the minimum competency level. Students were given the opportunity to re-work their papers to try to achieve this level if they so desired. A set of the criteria sheets is included in Appendix E. The grading was based on these criteria.

Merchandising Component:

Similar assessment procedures were developed for Merchandising 276. Competencies at the knowledge level based on principles were assessed by four 15 item tests, one for each module. The minimum competency level was set at 10 correct items. The table of specifications for these tests is given in Table 10.

Table 10

TABLE OF SPECIFICATIONS FOR MULTIPLE CHOICE TESTS
 FOR COMPETENCY-BASED MERCHANDISING 276

Question Number	COMPETENCY NUMBERS			
	MOD I	MOD II	MOD III	MOD IV
1	1.11	2.11	3.11	4.11
2	1.11	2.12	3.11	4.11
3	1.12	2.12	3.12	4.12
4	1.12	2.12	3.12	4.12
5	1.12	2.12	3.12	4.13
6	1.13	2.13	3.13	4.14
7	1.13	2.14	3.13	4.15
8	1.13	2.14	3.13	4.15
9	1.13	2.15	3.14	4.22
10	1.13	2.16	3.14	4.24
11	1.132	2.16	3.15	4.25
12	1.132	2.17	3.21	4.42
13	1.132	2.17	3.22	4.43
14	1.131	2.18	3.21	4.44
15	1.14	2.19	3.22	4.43

The competencies relating to computation were assessed by sets of problems. Each competency was weighted by the instructor in accordance with its importance, and a minimum competency score set for each one. These were communicated to students. The forms used for student records which include the maximum number of points and minimum competency levels for each competency are included in Appendix E. These were the tables of specifications for the computational part of the program. Computational pre-tests for independent study booklets were developed as stated earlier. Students were also permitted pre-testing at the beginning of each module for the purpose of taking advanced standing if they wanted.

The assessment of the student's ability to apply the general principles and computational techniques to their own business was evaluated in a project similar to that of Retailing component, in fact, in most cases was a continuation of it for those who had also taken the previous course. In an attempt to simplify instructions, rather than hand out separate criteria sheets for the project, explanation of competencies to be evaluated in the competency sheets was made more specific and students were referred to them more often. Criteria for assessing competencies in merchandising component are included in Appendix E.

The theory section was weighted 15 percent, the computation 35 percent and the project 50 percent for the purposes of translating the competencies to grades. In order to receive a "B" grade which was considered minimum competency level, the students were required to earn 40 points on theory, with three out of four theory competencies at minimum level, 112 points for computation with 16 out of 20 computational competencies at the minimum level. They needed to earn 80 points on each of the papers having achieved six out of eight competencies in the first paper, and nine out of 11 in the second paper. The requirements were adjusted up and down for other grades. Details are given in Appendix E.

Cooperative Fieldwork Component:

The assessment procedures developed for the competency-based cooperative fieldwork give more responsibility to the student's immediate supervisor in the store than in the traditional mode. This was based on the theory that despite several on-the-job observations by the college supervisor the store supervisor with daily contact was in a better position to give specific performance ratings. In the traditional format the store supervisors had no inputs on specific skills such as those required in competencies A1-24. They had only rated students in human relations and communications areas. The supervisors rated the performance level of the activity on the trainee plan as either Excellent, Good or Fair. When an activity was only observed, a check was to be used. All activities in Column I and at least two activities in each of the four categories in Column II required performance ratings. Students were to earn at least a rating of "good" on 80 percent of these competencies to achieve minimum competency.

Specific criteria were developed for rating those competencies acquired during the work experience which could not be assessed by observation but had

to be described in writing to be evaluated. The criteria are included in Appendix E. This part of the assessment was referred to as the student's "paper." These seven competencies are grouped under section B of the competency list.

The assessment of student competencies in 15 human relations and communications skills/attributes was rated on a checklist by both their immediate supervisor and the college coordinator. Minimum competency level was an average rating of 3 on a 5 point scale by both evaluators, over all the skills. Student participation in the Wednesday night seminars was reflected in the college coordinator's ratings.

A new instrument in a checklist form was developed as an assessment instrument for the competency-based cooperative fieldwork program. The instrument used in the traditional S.U. program which appears in Appendix E had nine items in a descriptive rating scale with each item having five descriptors assigned to it. Eight of the original nine items were used in the new instrument. The item "emotional stability" was eliminated as its descriptors indicated an overlap with "judgment" and "self-confidence." The descriptors on the items that remained were altered so that an average (i.e., adequate, acceptable) rating would fall in the third descriptor on a 1-5 point scale. Descriptors on the old form were heavily weighted on the positive end of the scale. The descriptors were also altered to increase the probability of equal intervals occurring between them. This was done more intuitively than empirically due to time limitations within the project to run a Q sort. Ambiguous wording of descriptors was minimized.

Another 6-item instrument called a "Cooperative Work Report" in an open-ended question format was used for evaluation in the traditional program (see Appendix E). Two items, "responsibility" and "initiative" were added to the new instrument from this form and put in the more objective checklist format with five descriptors assigned on a 1-5 point scale. The item relating to "follow-through on assignments" was reflected in the descriptors for initiative. Attendance was reflected in category on "responsibility," "effectiveness on the job" became "personal fitness for the job" in the new instrument.

A third instrument, "Checklist for Work Traits" designed by the Syracuse Regional Learning Service which had drawn heavily on the Oswego and Onondaga County BOCES Employability Profiles was also examined. The researcher on the current project had been involved in the development of this checklist. It was decided to include three attributes, "peer relations," "leadership" and "reaction to authority" from this checklist, although only some of the descriptors were used and some altered. Finally, an item "reaction to management point of view" was added. This item was suggested by a review of checklists from other schools and Crawford competencies which related to students' attitudes to the management role in human and public relations. The final instrument included 15 items and a space was left for additional comments. The form is shown in Table 5 of the main body of this report.

The final competency was that students should be able to realistically evaluate their own human relations/communications skills. This capability

was assessed by having students assess their own skills on the same checklist used by their immediate supervisors and the college coordinator. To achieve competency, the student's average rating over all the skills was not to vary from either of their supervisor's ratings by more than one point. If it did so, the student performance was to be reviewed with the college coordinator until competency level could be reached.

For purposes of translating these competencies to grades, the college coordinator weighted competencies A(1-24) 40%, B(1-7) 20% and C(1-2) 40%.

E. New York State Distributive Education Curriculum Needs Met by Syracuse Competency-Based Academic-Occupation Components

A teacher must be trained to meet the needs of school learners. These needs have been interpreted in New York State in a new "Distribution and Marketing Syllabus" which is currently being disseminated by the New York State Education Department, Bureau of Distributive Education. The retailing, merchandising and cooperative fieldwork components of the Syracuse competency-based program include the subject matter areas covered by the new secondary curriculum. They provide excellent preparation to teach in all its dimensions. A list of the modules from the NYS Distribution and Marketing Syllabus is matched below with modules from the competency-based retailing, merchandising and cooperative work experience components of the Syracuse program.

F. Competency Basing in Professional Education and Other Distributive Education Program Components

Competencies in the professional education component of the distributive education program were to be those developed by the School of Education Project Re-Design. Development in this area has not been as rapid as was anticipated at the beginning of this project but progress has been made, especially in the establishment of processes which will make possible the ultimate empirical determination of the competencies established. Accomplishments to date are listed as follows:

1. The orientation admissions component has been implemented. (EDU 300) This is a personalized orientation for the career decision making process and early planning for educational options. The competencies are:
 - a) The student will gain ability to successfully evaluate his/her academic and personal strengths or weaknesses as a basis for planning personal, individualized pre-service teacher training.
 - b) The student will be able to successfully evaluate his/her ability to work with children through the first-hand investigation of programs of their intended major.
 - c) The student will develop the ability to better identify personal goals and professional career choices.

COMPARISON OF MODULES IN NYS SECONDARY DISTRIBUTION AND MARKETING
SYLLABUS AND TRAINING UNITS PROVIDED IN SYRACUSE COMPETENCY-
BASED DISTRIBUTIVE EDUCATION PROGRAM

NYS Distribution and Marketing Modules

Function, Scope and Trends of Marketing¹
Career Opportunities
Product Information²
Buying Merchandise
Marketing Research
Sales Promotion⁶
Communications⁴
Personal Selling³
Credit and Collections
Human Relations⁵
Recordkeeping, Manual & Automatic Data
Processing⁷
Business and Government Relations
Marketing Management¹

1. Also separate complete course Marketing
2. Technical courses: Textiles, Clothing, Home Furnishings, Nutrition, etc.
3. Also separate course Salesmanship
4. Speech course requirement: Major paper requirement with each module.

Syracuse Competency-Based Retailing, Merchandising and Cooperative Fieldwork Modules

Retail marketing, Mod I, II, III
Co-op, Retailing Mod V
Co-op, Merchandising Mod IV
Co-op, Merchandising Mod IV
Retailing Mod II
Co-op, Retailing Mod VI
Co-op, Retailing Mod VI, Merchandising Mod IV
Co-op, Retailing Mod VI
Co-op, Retailing Mod VII
Co-op, Retailing Mod V
Merchandising Mod II
Co-op, Retailing Mod I, VIII
Retailing Mod V, VI, VII, Merchandising Mod I, III, IV
Co-op, Retailing Mod V

5. Also Psychology and Sociology courses
6. Also separate courses Display, Advertising
7. Also separate course in Accounting

The feedback to date is good. The Distributive Education majors are having their "first-hand investigation of programs in their intended major" by working with school stores, DECCA clubs and tutoring individual secondary distributive education students.

2. A profiling system has been developed so advisors know where a student is coming from, and where he or she wants to go.
3. The School of Education has done away with three hour courses for the teacher preparation components and replaced them with mini-courses and modules. Students have the opportunity to select the parts that meet their needs. An analysis of current choices of Distributive Education students showed no clear pattern of selection emerging to date. The program is still in transition.
4. The School of Education is beginning to develop a consortia at the secondary level that will have the capacity to follow through and translate the theoretical aspects of the teacher education program into performance or practical demonstration. Field measures will parallel campus measures so that competencies will be demonstrated in terms of performance. The School of Education has entered into an agreement with two school districts for the establishment of a Teacher Training Center jointly conducted by the faculties of Syracuse University and the respective school districts. These have been operative at the elementary level during the past year. The secondary programs will build on this experience. One of the districts has a distributive education program. Currently, the traditional student-teaching experience is still the mode.

Little has been done in competency-basing in the academic-liberal arts component of the distributive education program. The project researcher is cooperating with the Maxwell School of Citizenship in an interdisciplinary effort to develop competencies in the social sciences needed by professional schools.

Low scores in the math diagnostic test have led to the recommendation that students take accounting as a prerequisite for the merchandising component. This recommendation has been implemented this semester.

In the specialized occupational support areas other than the retailing and merchandising and cooperative fieldwork components no competency-basing has been done to date.

CHAPTER III

RESULTS OF COMPARISON OF TRADITIONAL AND COMPETENCY BASED MODES OF INSTRUCTION ON STUDENT ACHIEVEMENT

One of the considerations in developing the assessment techniques used in evaluating student achievement as described in Chapter II was to use those that would be useful in comparing students taught similar content in a traditional course credit mode and those taught in a competency-based mode. Robert Howsam, dean of the College of Education, University of Houston made the following statements about what people meant by competency-based or performance-based instruction recently at a National Study Conference.

Essentially they are saying that all learning is individual--that the individual, whether teacher or learner, is goal-oriented.

They are saying that the teacher-learning process is facilitated if the teacher knows what he wants the pupil to learn and if the learner is aware of precisely what is expected of him or what he expects of himself. Precise knowledge of results also enhances learning.

Finally, they are saying that the learner or teacher is most likely to do what is expected of him and what he expects of himself if he is accountable for doing what he undertakes.

The opportunity arose at Syracuse University as a result of this project to compare a group of students taught in the content areas of Retailing and Merchandising in the academic year 1973-74 under a traditional course credit format and one taught in a competency-based format in the following academic year, 1974-75. The courses were formerly taught in a traditional mode. As Schalock states, "CBTE/non-CBTE research design calls for clarity as to what constitutes significant program differences, essentially 'pure cases' of mature, fully functional programs that reflect these differences, and teacher educators willing to engage in a comparative research effort" (Schalock in Houston 1975). The time frame permitted in this project can hardly be considered sufficient to develop a "mature fully functional program." On the other hand, program change was definitely implemented in the fall of 1974 and the spring of 1975 in these two areas of Retailing and Merchandising. Any changes evident in student achievement would thus be judged in a conservative direction, with the assumption that as the program matures, the direction of change would remain the same and its degree be amplified. It was also planned to get other colleges to cooperate in the research process. The State University College at Buffalo and Baruch College in New York City both cooperated in the ways described below.

The major characteristics of the two instructional modes as seen in the Syracuse program are:

Traditional

1. Course outlines of topics to be covered provide sources of goal statements for a course (Example in Appendix A).
2. Course outlines are shared with students.

Competency-based

1. Course goals are clearly stated in behavioral statements of competencies to be achieved by students at the end of course, including the criteria to be used for assessing them. (Competency statements, instructions and criteria sheets included earlier in the report and in Appendix A.)
2. The list of competencies and criteria for achieving them are shared with students.
3. Within the time frame available students are given as many opportunities as possible to achieve competency level, after receiving results of an initial evaluation of tests and projects.
4. Materials for alternative learning experiences are provided where possible.

One of the major objectives of the current project was to empirically determine if differences in student achievement occurred in program components taught under these two formats and to what extent the differences could be attributed to the difference in format.

Comparison of Achievement of Student Groups
in the Retailing Component

A. Research Design

In comparing groups, the major variables other than course format are the instructor, course content, student characteristics and assessment procedures. The project was planned to eliminate the effect of these variables as much as possible. The student group taking the retailing component taught in 1973 in the traditional format described above and referred to as Syracuse Traditional I was initially compared with the student group taking this component under the competency-based format used at Syracuse in the fall of 1974. These two groups had the same instructor, used the same text and student characteristics appeared similar. The methods of assessment were similar for their final paper, but only some of the test items were the same. It was therefore necessary to locate another student group with similar characteristics, covering the same content in the traditional format that would use identical

assessment instruments as the Syracuse competency-based group. The retailing class at the State University College at Buffalo was selected and agreed to use the tests developed for the Syracuse competency-based group. (CB) With the appointment of a new instructor at Syracuse in the fall of 1975, the opportunity arose to teach the retailing component a fourth time (the third time in traditional format) at Syracuse with a similar student group, same text and course content, identical assessment instruments and only a different instructor. Student achievement was then compared between the four groups. A summary of the research design for the retailing component is given in Table 11.

TABLE 11
RESEARCH DESIGN FOR RETAILING COMPONENT

<u>Student Group</u>	<u>Year</u>	<u>Format</u>	<u>Content</u>	<u>Instructor</u>	<u>Assessment</u>	
					<u>Test</u>	<u>Paper</u>
S.U. I	1973	Trad.	x	1	-	P
S.U.	1974	CB	x	1	T	P
S.U. II	1975	Trad.	x	2	T	P
Buffalo	1975	Trad.	x	3	T	P

a) Student Characteristics

The characteristics of the four student groups were compared to identify any differences within the groups that might account for differences in student achievement other than the course itself. An analysis of variance and the chi square test were used to compare the student characteristics of major-non-major, class, score on a simple math test, SAT verbal and SAT math scores, high school rank and grade point average at the end of the semester in which they took the retailing component.

There was no evidence that the three Syracuse groups differed with regard to major-non-major status or class. The Buffalo group had seventeen freshmen in a class of 81 while there were no freshmen in the Syracuse groups. As this was the introductory course in the subject area for all the students, it was not considered that freshmen were at a particular disadvantage as far as this course was concerned. The comparison between Syracuse Traditional I and the three other groups showed very slight differences, none approaching significance, but all favoring the Syracuse Traditional I group for SAT verbal and SAT math scores, high school rank and grade point averages. The scores on the 10-item math diagnostic test showed Syracuse Traditional I group to be significantly higher than Syracuse Traditional II but exactly equal to the CB group. The comparison between the Syracuse Traditional II group and the CB group showed no differences in SAT verbal scores nor in grade point averages, with very slight differences, not approaching significance but favoring the competency-based group on SAT math scores and math test scores.

Data on the Buffalo group were not as complete as for the Syracuse groups due to the lack of information on SAT scores and high school rank for transfer and SEEK students. Data on grade point average at the end of the semester, which was complete for all students, showed no significant differences between the groups. The very slight differences shown tended to favor the Buffalo group.

The number of cases reported, the means and standard deviations for SAT math and SAT verbal scores, math test scores and grade point averages for the four student groups that took the retailing component are given in Tables 12 and 13.

TABLE 12

COMPARISON OF STUDENT GROUPS IN RETAILING BY
SAT MATH SCORES AND SAT VERBAL SCORES

Group	SAT Math			SAT Verbal		
	Sample Size	Mean	Standard Deviation	Sample Size	Mean	Standard Deviation
S.U. Competency-Based	37	499	83.9	37	483	86
S.U. Traditional I	45	483	90.4	45	458	78
S.U. Traditional II	38	468	74.5	38	453	72
Buffalo Traditional	28	478	65	28	450	91

TABLE 13

COMPARISON OF STUDENT GROUPS IN RETAILING BY MATH SCORES AND
GRADE POINT AVERAGES AT END OF COURSE SEMESTER

Group	Math Scores			Grade Point Averages		
	Sample Size	Mean	Standard Deviation	Sample Size	Mean	Standard Deviation
S.U. Competency-Based	45	7.6	2.66	49	2.73	0.49
S.U. Traditional I	47	7.6	2.45	57	2.60	0.42
S.U. Traditional II	48	6.65	2.43	52	2.62	0.56
Buffalo Traditional	--	--	--	85	2.72	0.58

The general conclusion therefore is that there is no reason to suppose that the four groups of students differed before taking courses in retailing. Any slight difference in scores tended to favor the Syracuse Traditional I group.

b) Content:

The distributive education program at the State University College at Buffalo is similar to the one at Syracuse. The Distributive Education and Retailing programs are in the College of Home Economics (Caudell Division of Applied Arts and Sciences) rather than in the School of Business. At Syracuse they are in the College for Human Development. Dr. Allan Korn, chairman of the department of Consumer and Business Studies agreed to cooperate in this project. He reviewed the course outline and competencies for several of the modules and stated that he felt the same material was covered at Buffalo as in the Syracuse program and that students would find the tests appropriate, even though a different text was used (Rachman, 1969). It was agreed that when he saw the test items that were specifically keyed to the Syracuse competency-based program, if there were any of them that Buffalo did not teach for that they would so indicate and those questions would not be included in the analysis. They used all the questions. The instructor for Syracuse Traditional II program had the same option. He eliminated five questions. Although the Buffalo faculty had not used the type of project that Syracuse did, the Buffalo program director felt the students should be able to do it and he agreed to have the project assigned. The test items were sent to Buffalo in two sets, as a midterm and a final rather than in module units. The Syracuse Traditional II group used the same sets.

c) Instructors:

The same instructor taught the Syracuse Traditional I program and the Syracuse Competency-Based program. (Instructor I) The instructor in Syracuse Traditional II program had a broad business background but was teaching the retailing component for the first time. (Instructor II) On an OMNIQUEST form the students rated Instructor II slightly higher for classroom instruction than Instructor I. The Syracuse Instructional Rating Survey (IRS) developed by Sterns and Richmond and the University of Illinois Measurement and Research Division CEQ form 73 were also administered. Every other student used a different one of these forms. The Syracuse Traditional II class was taught in two sections, one MWF and one TTh. The percentile scores comparing this course with all other Human Development courses was almost identical for Instructor I and Instructor II for MWF group, over the first fifteen items relating to the instructor/instruction. The TTh group rated Instructor II lower than Instructor I. Different items favored different instructors. Instructor evaluation data were not collected at Buffalo (Instructor III) Consultation with the program director indicated no reason to expect student ratings of Instructor III to vary greatly from ratings of Syracuse instructors.

There seems to be no evidence that a difference in student achievement could be attributed to major differences between instructors. Resumés of instructors are included in Appendix G.

d) Assessment procedures:

The assessment procedures included multiple choice tests and a formal paper. There was an expression of dissatisfaction with the tests among the Syracuse Traditional II students as 41 percent judged the tests as "somewhat unfair; frequently tested things I didn't think were taught or required." This was compared to only 12 percent of the students in the competency-based mode who rated them in the same manner. Lack of congruence between curriculum intent and testing procedures is not atypical of traditional programs (Charters, 1971). Almost 80 percent of both the competency-based and the Traditional II groups of students agreed that the final projects were highly rewarding or "difficult but worth the effort."

B. Results

There were 82 items on the multiple choice test used for Syracuse University Traditional I group in fall of 1973. There were 74 items in the multiple choice test used for Syracuse Competency-based, Syracuse Traditional II group and Buffalo Traditional groups. These two tests had 31 items in common, but the removal of three items by the Syracuse Traditional II instructor, reduced the number to 28. The mean difficulty level on the 28 items for the groups were: Buffalo traditional 54.82; Syracuse Traditional II, 62.25; Syracuse Traditional I, 70.89; Syracuse competency-based, 76.82. The opportunity for test makeups in the competency-based format was a key contributor to the higher difficulty levels for this group.

Very few students improved their scores on Mod 8 compared to the other modules. The mean score for the 14 students who took the make-up was 3.9. The mean score for the same students on the original Mod 8 test was 6.4. The means were significantly different using t test to compare differences at the .01 level. This would indicate that the make-up was much harder than the original. This may have been due to a new question design which included the following directions:

Each of the remaining questions are divided into
two statements

- If only statement 1 is true, the answer is a
- If only statement 2 is true, the answer is b
- If both statements are true, the answer is c
- If both statements are false, the answer is d

Table 14 summarizes the percentages of students in the Buffalo Traditional group, Syracuse Traditional II and the Syracuse competency-based groups that achieved competency on the multiple choice test. A higher percentage of the Syracuse competency-based group achieved competency on 16 out of the 19 competencies. More of the Syracuse Traditional II group achieved competency 1.4 relating to employment and training opportunities. Both the Syracuse Traditional II group and the Buffalo Traditional group had a higher percentage of the group achieve competency 4.3 in display. Eighty-six percent of both

TABLE 14

PERCENTAGE OF STUDENTS ACHIEVING COMPETENCY ON MULTIPLE CHOICE
QUESTIONS IN RETAILING COMPONENT IN BUFFALO TRADITIONAL AND
SYRACUSE COMPETENCY-BASED PROGRAMS,
CLASSIFIED BY COMPETENCY

Module	Competency Number	No Questions N=68*	Percent Competencies Achieved		
			Buffalo Traditional	Syracuse Traditional 1975	Syracuse Competency- Based
I	1.1	(5)	79	82	91
	1.2	(7)	69	68	78
	1.3	(3)	56	55	73
	1.4	(1)	23	62	54
III	3.1	(4)	38	43	66
	3.2	(1)	80	86	86
	3.3	(1)	83	80	88
	3.4	(1)	65	62	73
IV	4.1	(4)	65	62	72
	4.2	(2)	63	65	81
	4.3	(2)	71	85	66
V	5.1	(5)	59	53	83
	5.2	(4)	65	67	87
VI	6.2	(6)	45	56	79
	6.4	(3)	53	46	82
VII	7.1	(5)	53	60	72
	7.2	(5)	65	71	83
VIII	8.1	(4)	57	72	80
	8.2	(5)	59	77	82

*Mod II is evaluated primarily in research assignment so the one multiple choice question for 2.6 is not included.

the Syracuse Traditional II group and the Syracuse competency-based group achieved competency 3.2 relating to trends in retail location. These percentages are illustrated in a graph in Table 15. They are summarized into modules in Table 16. More than 70 percent of the Syracuse competency-based group was able to achieve competency on 16 out of the 19 competencies in the retailing component during the semester. In the Buffalo Traditional group, there were only three competencies on which more than 70 percent of the group got all the questions correct. More than 70 percent of the Syracuse Traditional II group achieved competency on seven out of the 19 competencies.

The means, variances and sample sizes for the Syracuse competency-based Syracuse Traditional II and Buffalo Traditional groups for the 28 items that were common in the tests for the three groups, are given in Table 17.

The analysis of variance for the three groups on the 28 item multiple choice questions they had in common with the Syracuse Traditional I group is given in Table 18.

The aposteriori comparisons for the three groups on average score on 28 test items using the Scheffe method is given in Table 19.

The three means are significantly different at the .01 level of significance. All comparisons between pairs of means are significant ($p < .01$). This would tend to support the conclusion that the Syracuse University competency-based group scored significantly higher on these 28 multiple choice items. The means, variances and sample sizes for the three groups on the entire 69 item test is given in Table 20.

The analysis of variance summary for the three groups on average student score on 69 item multiple choice test is given in Table 21.

The aposteriori comparisons for the three groups on the 69 item multiple choice test in retailing using the Scheffe method are given in Table 22.

Student scores from the Syracuse competency-based group on the 69 item test are significantly ($p < .01$) higher than the scores in either the Syracuse Traditional II group or the Buffalo group. There is not a significant difference however between the scores of the two traditional groups. This would tend to support the conclusion that students achieved better on this test under the competency-based format than under the traditional format.

Student achievement in the retailing component was also examined by a comparison of competencies achieved in the project. The criteria used to evaluate the projects are included in Appendix E. A random sample of 50 percent of the papers in all four groups, the Syracuse I and II and Buffalo Traditional groups and the Syracuse competency-based group are also included. The same person evaluated all these sets of papers. Details of student achievement by competency are given in Tables 1-4 of Appendix F. The percentages of students achieving competencies on the project in the four student groups are displayed in Table 23. The same data is charted in Table 23a.

TABLE 15

- . . . Buffalo Traditional

— Syracuse Competency Based

- - - Syracuse Traditional 197

GRAPHIC PRESENTATION

PERCENTAGE OF STUDENTS ACHIEVING COMPETENCY ON MULTIPLE CHOICE QUESTIONS
IN RETAILING COMPONENT IN BUFFALO TRADITIONAL, SYRACUSE TRADITIONAL AND
COMPETENCY-BASED PROGRAM, CLASSIFIED BY COMPETENCY

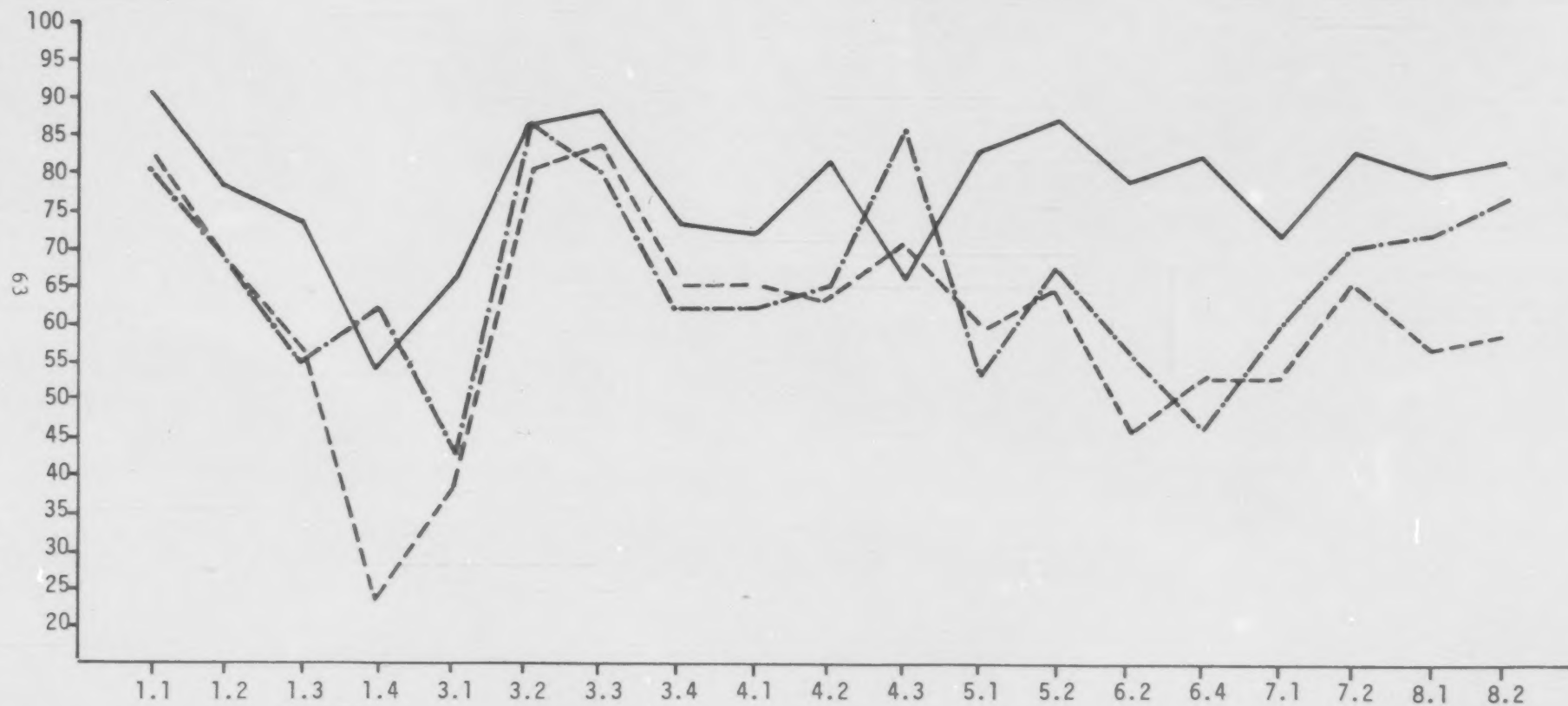


TABLE 16

▨ Buffalo Traditional

□ Syracuse Competency-Based

■ Syracuse Traditional 1975

PERCENTAGE OF STUDENTS ACHIEVING COMPETENCY ON MULTIPLE CHOICE QUESTIONS
IN RETAILING COMPONENT IN BUFFALO TRADITIONAL SYRACUSE TRADITIONAL AND
SYRACUSE COMPETENCY-BASED PROGRAMS, CLASSIFIED BY MODULE

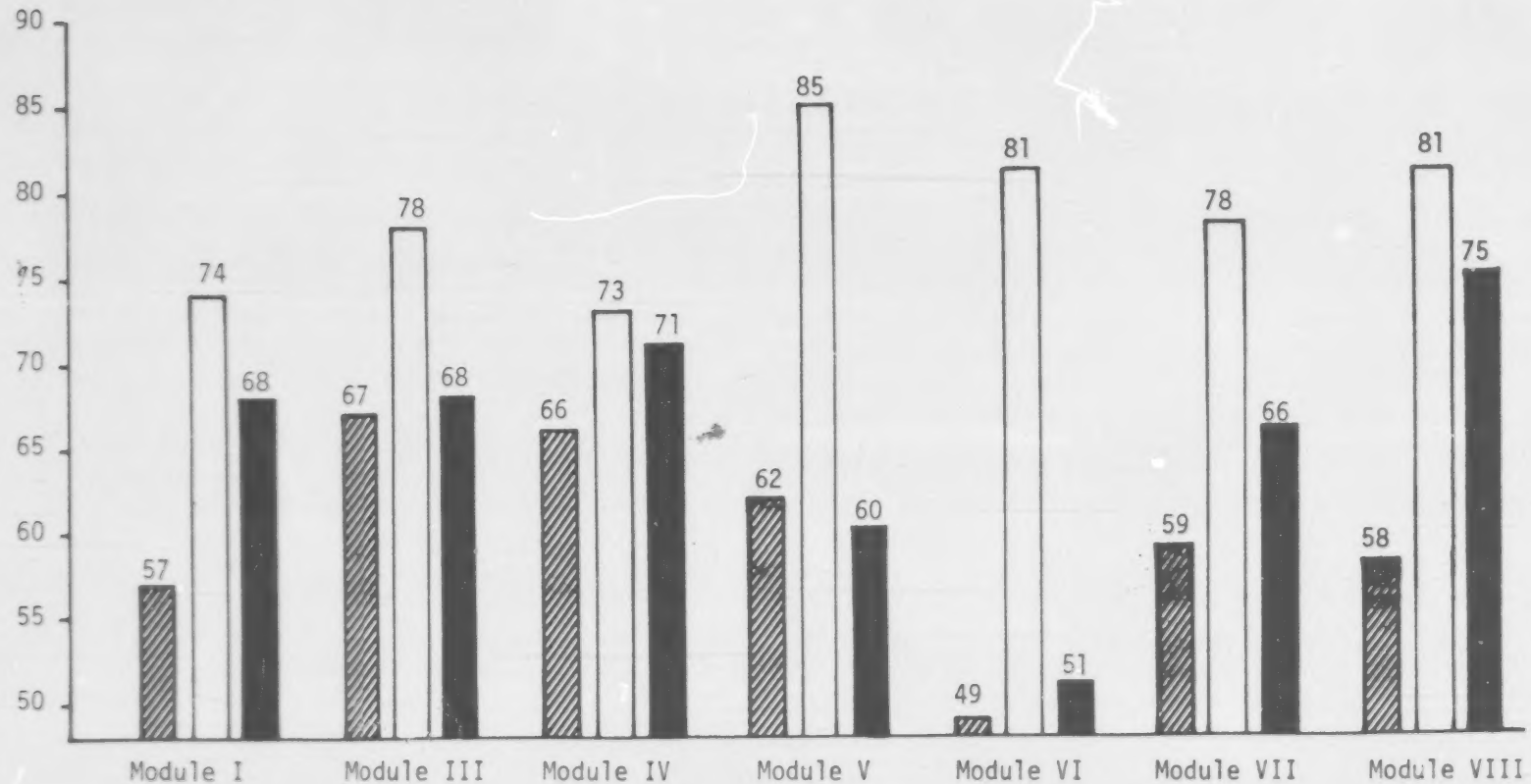


TABLE 17

MEANS, VARIANCES AND SAMPLE SIZES FOR THREE GROUPS
ON COMMON 28 MULTIPLE CHOICE ITEMS IN RETAILING

Group	X	S ²	N
Syracuse University Competency (1)	21.732	8.71	56
Syracuse University Traditional II (2)	17.523	8.97	65
Buffalo Traditional (3)	15.708	8.71	72

TABLE 18

ANALYSIS OF VARIANCE SUMMARY FOR THREE GROUPS ON
COMMON 28 MULTIPLE CHOICE ITEMS IN RETAILING

Source of Variation	Sum of Squares	d.f	Mean Square	F
Between means	1172.05	2	586.03	66.518
Within groups	<u>1674.07</u>	<u>190</u>	8.81	
Total	2846.12	192		

TABLE 19

APOSTERIORI COMPARISONS FOR THREE GROUPS ON COMMON 28 MULTIPLE
CHOICE ITEMS IN RETAILING BY SCHEFFE METHOD

Group Mean	Group Code		
	1	2	3
21.73 (1)	-	60.52*	130.06*
17.52 (2)		-	12.82*
15.71 (3)			-

*p < .01.

TABLE 20

MEANS VARIANCES AND SAMPLE SIZES FOR THREE GROUPS
ON 69 ITEM MULTIPLE CHOICE TEST IN RETAILING

Group	X	S ²	N
Buffalo Traditional (1)	42.60	36.03	72
Syracuse University Competency (2)	54.33	26.45	46
Syracuse University Traditional II (3)	44.75	35.91	65

TABLE 21

ANALYSIS OF VARIANCE SUMMARY FOR THREE GROUPS ON
69 ITEM MULTIPLE CHOICE TEST IN RETAILING

Source of Variation	Sum of Squares	d.f.	Mean Square	F
Between means	4105.76	2	2052.88	61.14
Within groups	6043.49	180	33.57	
Total	10149.25	182		

TABLE 22

APOSTERIORI COMPARISONS FOR THREE GROUPS ON 69 ITEM MULTIPLE
CHOICE TEST IN RETAILING BY SCHEFFE METHOD

Group Mean	Group Code		
	1	2	3
42.60 (1)	-	115.33*	4.73
54.33 (2)		-	73.55
44.75 (3)			-

*All differences significant to .01 level.

TABLE 23

PERCENTAGE OF STUDENTS ACHIEVING COMPETENCY ON FINAL RETAILING
PROJECT IN BUFFALO TRADITIONAL, SYRACUSE TRADITIONAL I AND II
AND SYRACUSE COMPETENCY-BASED PROGRAMS CLASSIFIED
BY COMPETENCY

Sample	Total	Buffalo Traditional		Syracuse Traditional I		Syracuse Traditional II		Syracuse Competency-Based	
		No. 35	% 100	No. 19	% 100	No. 32	% 100	No. 26	% 100
Module A	Competency								
I-III	Rationale	33	94	19	100	32	100	23	88
B	Location	1	3	16	84	28	88	21	80
Module C	Building	5	28	8	42	16	50	23	88
IV	D Layout	19	54	16	84	15	47	17	65
Module E	Organization	6	17	12	63	13	41	14	54
V	F Personnel	0	0	1	5	15	47	11	42
Module G	Advertising	2	6	1	5	4	13	22	85
VI	H Budget	1	3	1	5	1	3	22	85
	I Promotion								
	Calendar	1	3	3	15	13	41	21	80
	J Sales Policy	1	3	6	31	0	0	13	50
Module K	Customer								
VII	Service	6	17	13	68	16	50	24	92
	L Credit	4	11	9	47	6	19	16	62
Module M	Expenses	1	3	0	0	4	13	13	50
VIII	N Sales								
	Transactions	11	31	16	84	25	78	23	88

The means, variances and sample sizes for the four groups on average competency in the retailing project are given in Table 24.

The analysis of variance summary for the four groups on average competency attainment in retailing as assessed by the project is given in Table 25.

The overall F is significant at the .01 level. The aposteriori comparisons for the four groups on average competency attainment on retailing project using Scheffe method are given in Table 26.

TABLE 23a

----- Buffalo Traditional
 ----- Syracuse Competency Based

----- Syracuse Traditional 1973
 ----- Syracuse Traditional 1975

PERCENTAGE OF STUDENTS ACHIEVING COMPETENCY ON FINAL RETAILING PROJECT
 IN BUFFALO TRADITIONAL, SYRACUSE TRADITIONAL 1973 AND 1975 AND SYRACUSE
 COMPETENCY-BASED PROGRAMS CLASSIFIED BY COMPETENCY

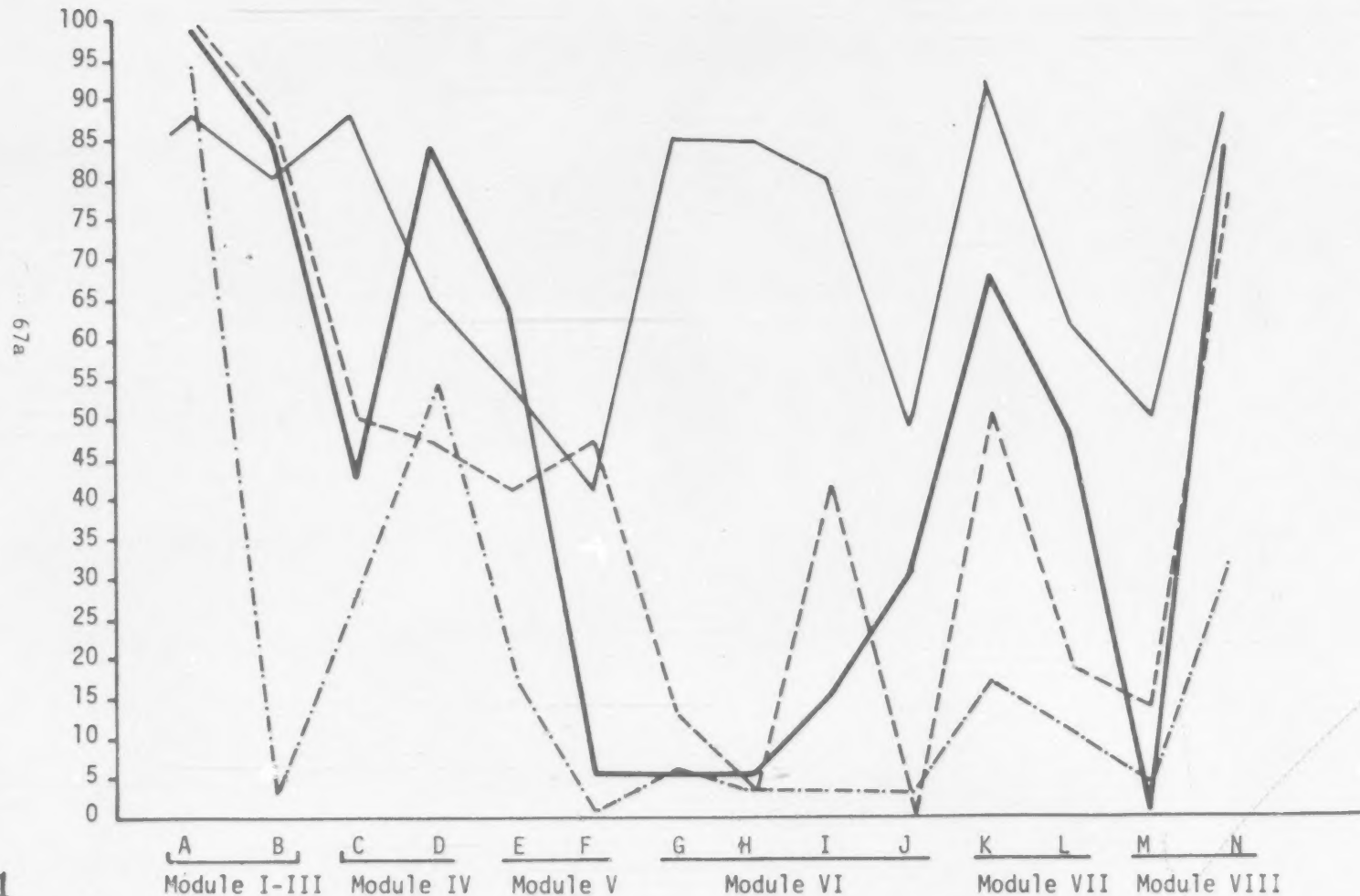


TABLE 24

MEANS, VARIANCES AND SAMPLE SIZES FOR FOUR GROUPS ON
AVERAGE COMPETENCY ATTAINMENT IN RETAILING PROJECT

Group	X	S ²	N
Syracuse University Traditional I (1)	6.26	2.54	19
Buffalo Traditional (2)	2.60	2.36	35
Syracuse University Competency-based (3)	10.44	7.76	25
Syracuse University Traditional II (4)	5.88	3.98	32

TABLE 25

ANALYSIS OF VARIANCE SUMMARY FOR FOUR GROUPS ON AVERAGE
COMPETENCY ATTAINMENT IN RETAILING PROJECT

Source of Variation	Sum of Squares	d.f.	Mean Square	F
Between Means	898.81	3	299.60	73.58
Within groups	<u>435.75</u>	<u>107</u>	4.07	
Total	1334.56	110		

TABLE 26

APOSTERIORI COMPARISONS FOR FOUR GROUPS ON AVERAGE COMPETENCY
ATTAINMENT ON RETAILING PROJECT BY SCHEFFE METHOD

Group Mean	Group Code			
	1	2	3	4
6.26 (1)	-	40.66*	46.28*	0.439
1.60 (2)		-	220.30*	44.14*
10.44 (3)			-	71.86*
5.87 (4)				-

*p < .01

All comparisons between pairs of means are significant at the .01 level except that between the Syracuse Traditional I and Syracuse Traditional II groups. This would tend to support the conclusion that competency attainment by students in group 3, the Syracuse University competency-based group is significantly ($p < .01$) greater than the competency attainment in either of the other three groups, as demonstrated by the retailing project.

Comparison of Achievement of Student Groups in Merchandising Component

A. Research design:

For the merchandising component, the first two groups to be compared were the group taught at Syracuse in the spring of 1974 in the traditional format and the same group taught in competency-based format at Syracuse in the spring of 1975. Student achievement was measured in the traditional format by the use of computational problems, a final project and essay questions. The essay questions tested such a small sample of the knowledge of theory and principles that a multiple choice test was developed for the competency-based group. It was therefore necessary to locate a similar student group teaching merchandising that would be willing to use these assessment techniques. The State University College at Buffalo agreed to cooperate with this program component also. Some difficulties with the data described below led to a search for an additional group still using the traditional format to use the competency-based assessment techniques in the fall of 1975. Most schools offer their merchandising component in the spring, following a fall retailing component. Baruch College was offering merchandising in the fall of 1975 and two instructors agreed to cooperate.

a) Student characteristics

The characteristics of the student groups taking the merchandising component were compared as far as the data would permit using an analysis of variance and chi square tests. The comparison of SAT Math and SAT verbal scores, high school rank, grade point average and scores on the 10-item diagnostic math test gave no evidence that the two Syracuse groups, traditional and competency-based were different. The Buffalo student data were incomplete due to lack of information on SEEK and transfer students. A comparison of scores on the merchandising test between SEEK ($N=8$) and non-SEEK students ($N=23$) did not show groups to be different, but favored non-SEEK. A similar comparison of the grade point average at the end of the course semester between SEEK ($N=13$) and non-SEEK ($N=28$) groups showed the non-SEEK group to be significantly different. The grade-point average which was available for all students in the Buffalo group showed a negligible difference between their scores and either the Syracuse traditional or competency-based group, but one which favored Buffalo. Baruch student data, due to their open admission policy was not available. Their grade point average data had not been received by the date of submission of the report. The Baruch students were all juniors or seniors, with one exception while two-thirds of the Syracuse group were sophomores. The student scores on the diagnostic math test favored Baruch. Overall, there is

no evidence that differences in student achievement could be attributed to different student characteristics. Data other than for the two Syracuse groups were limited. Comparisons of SAT math and SAT verbal scores, math scores and grade point averages are reported in Tables 27 and 28.

TABLE 27
COMPARISON OF STUDENT GROUPS IN MERCHANDISING BY
SAT MATH AND SAT VERBAL SCORES

Group	SAT Math			SAT Verbal		
	N	X	SD	N	X	SD
S.U. Competency Based	38	487	86.1	38	459	77.7
S.U. Traditional	34	479	88.6	34	458	86.5
Buffalo	11*	506	99.1	11*	443	86.1
Baruch	-	-	-	-	-	-

*All non-SEEK students reporting SAT

TABLE 28
COMPARISON OF STUDENT GROUPS IN MERCHANDISING BY
MATH SCORES AND GRADE POINT AVERAGES

Group	Math Scores			Grade Point Average		
	N	X	SD	N	X	SD
S.U. Competency Based	54	7.56	2.49	42	2.62	0.41
S.U. Traditional	48	7.38	2.65	45	2.68	0.48
Buffalo	-	-	-	41	2.75	0.75
Baruch	38	7.71	2.86	*		

*Data still not available by date of report submission.

b) Content

The Syracuse Traditional and Syracuse Competency-based components used the same texts. The competencies for the latter group were developed by the program translation method using the traditional component as a base. The instructor in the Buffalo program reviewed the topics in the Syracuse program; the Baruch department chairman reviewed the competencies and all agreed that the merchandising components were similar. Buffalo used Wingate, Schaler and Miller, 1974 as a text and Baruch used Wingate, 1963. All the instructors worked under the agreement that if any of the competencies were not common to their program they would not be included in the analysis.

There was considerably more variation in the content of the merchandising component among schools than in the retailing component, judging from the number of competencies that instructors chose not to have included in the analysis.

c) Instructors

The same instructor taught the Syracuse traditional merchandising component and the Syracuse competency-based one. The Buffalo instructor and the two Baruch instructors all had broad business backgrounds. Instructor evaluation data were not collected in Buffalo. Student evaluation of the instructors using an OMNIQUEST form shown in Appendix C ranked the Syracuse instructor in between the two Baruch instructors' effectiveness of the lectures, interest level of class meetings and overall enjoyment of the class, but the Syracuse students felt they learned more than the Baruch students. Evaluation using the Sterns and Richmond Instructional Rating Survey and the Illinois CEQ gave similar results. The student scores on the first Baruch tests were not significantly different between sections and so due to the small size of the two sections (15 and 17), they were treated as one group. This would tend to average out any instructor effect in comparison with Syracuse.

c) Assessment procedures

The assessment procedures were of three types, multiple choice questions, computational projects and a final project simulating a retail business. In the Syracuse competency-based program, a test for each of the four modules was administered combining a 15 item multiple choice section with a problem section. The multiple choice format replaced essay questions in traditional Syracuse program. The project was assigned in two segments, one after Mods I and II, the other at the end of Mods III and IV. Buffalo chose not to administer the test for Mod IV on "Buying Merchandise." They have another complete course in their curriculum on buying, and did not cover the subject in the same depth in their introductory merchandising program as did Syracuse. The first two tests were administered at Buffalo as a separate multiple-choice quiz and an open-book computational test. Both parts of the Module III test were given together in open-book style. Even though formula sheets were permitted for the computational tests at all schools, the Buffalo administration procedures precluded comparisons. The method of administering the multiple choice portions

of the test at Buffalo would appear to favor the Buffalo group, especially that of Module III, but the data are reported. The project was assigned as planned and handed in in one paper at the end of the semester as in the Syracuse traditional format. The Baruch instructors administered the multiple choice and computational sections of the tests together, twice during the term, as a midterm and a final. They exercised their option to eliminate any questions that they felt had not been addressed in their own teaching of the merchandising component, in both the multiple choice and computational sections. Each instructor eliminated different sections. Only those parts of the assessment instruments that were common to both Baruch instructors and the Syracuse competency-based one were included in the analysis.

The Baruch students did not seem to feel the exams were unreasonable. In one group, 65 percent of the group felt the exams were "fair" or "very fair," 30 percent felt they were "somewhat unfair." In the other class they were evenly divided between thinking the tests were "fair" and "somewhat unfair." Only one student in each class judged them unfair. This is in contrast to the Syracuse competency-based group of students where 80 percent judged the tests "very fair." There is no basis for comparison as to how the Baruch students might have judged their own tests. The Baruch student groups did not do the final project.

A summary of the research design for the merchandising component is included in Table 29.

TABLE 29
RESEARCH DESIGN FOR MERCHANDISING COMPONENT

Group	Year	Format	Instructor	Assessment Procedures		
				Multiple Choice	Computation	Final Project
Syracuse	1974	Trad.	1	-	Select*	x
Syracuse	1975	CB	1	x	x	x
Buffalo	1975	Trad.	2	Select*	-	x
Baruch	1975	Trad.	3 & 4	Select*	Select*	-

*Items selected to correspond to program. Only items common to groups compared were included in analysis.

B. Results

It will be recalled that there were no multiple choice questions in the Syracuse traditional format. Average student scores for the other groups are

reported by module in Table 30. The number of items in each module on which the score is determined includes only those items out of the original 15 constructed that were used by all groups.

TABLE 30

AVERAGE STUDENT SCORES ON MULTIPLE CHOICE SECTION MERCHANDISING COMPONENT FOR SYRACUSE COMPETENCY-BASED, BUFFALO AND BARUCH TRADITIONAL GROUPS

Group	Mean Student Scores				Total (49 items)
	Module I (12 items)	Module II (14 items)	Module III (8 items)	Module IV (15 items)	
Syracuse Competency- Based	8.81	10.26	6.22	10.59	36.33
Buffalo Traditional	9.84	9.47	6.5	--	--
Baruch Traditional	7.25	9.52	4.8	10.12	31.68

The average student score over the 49 common multiple choice items was 31.68 for the Baruch group and 36.33 for the Syracuse competency-based group. The scores are significantly different at the .01 level as measured by the t test. (The Buffalo administration procedures on these modules precluded comparison.) This supports the hypothesis that student achievement is better under the competency based mode on competencies measured by multiple choice format.

In the assessment of computational competencies a problem format was used. A formula sheet was permitted in all groups but as the Buffalo group was permitted open-books, the results were not considered comparable. Student test papers for the Syracuse traditional group were not all retained so two procedures were followed for comparing the traditional and competency-based groups. The traditional group had used three tests, the competency-based format used four tests, one for each module.

Procedure I - Common elements in tests for S.U. traditional and S.U. competency based groups were graded by 1975 criteria. The criteria were adjusted so non-similar elements were eliminated. The result was a comparable numerical test score for each group.

Procedure II - Common elements in tests for S.U. traditional and S.U. competency-based groups were graded by 1974 criteria. The criteria were adjusted so non-similar elements were eliminated. The result was a comparable numerical test score for each group.

In Mod I there were enough student tests available from the traditional group that it was possible to apply both Procedure I and Procedure II to the

two sets of papers. Using Procedure I both sets of papers were scored based on 1975 criteria. The mean student score for the competency-based group was 26.7 (N=56) and 23 (N=48) for the traditional group. There was a significant difference ($p < .05$) between these means measured by the t-test.

The analysis using Procedure II based on 1974 criteria gave a mean student score for competency-based group of 74.8 (N=53) and 58.5 (N=48) for the traditional group. Both sets of papers were scored with the adjusted criteria. The obtained value of t , 2.687 is significant at .01 level supporting the hypothesis that students scored better on average in competency-based mode than in the traditional mode. Both procedures gave similar results. This fact gave additional credence for results in comparing the other two tests where data were only available to use Procedure II. All scoring was done by the same person.

The traditional test 2 and that for Module II were similar. Procedure II was used to compare student groups. The competency-based papers were re-graded by 1974 (traditional) criteria and compared to the grade book score for the earlier year. This means that actual scoring was done by two different people although criteria were carefully checked. The mean score for competency-based group was 82 (N=54) and 64.8 (N=51) for the traditional group. The obtained t -score of 3.4282 evidenced significant difference between the means of the two groups beyond the .01 level.

Questions from the traditional test three were included in tests for Modules III and IV for the competency-based group. Procedure II was again applied to the 1975 data, re-grading the papers using 1974 (traditional) criteria and comparing them to 1974 grade book scores. The mean of the competency-based group was 87.6 (N=51) and the mean of the traditional group was 69 (N=50). The obtained t -score of 5.2485 is significant at the .01 level.

These two Syracuse groups, with the same instructor, used the same text. The results of the above analysis of student achievement for these two groups gives strong support to the hypothesis that students achieve better under the competency-based mode. Further support for this hypothesis comes from a comparison of the Baruch traditional and Syracuse competency-based student group scores on the computational competencies. The Baruch group excluded some computational competencies, as was their option: The mean student score on the common competencies completed was 47.8 for Baruch compared to 69.3 for the Syracuse competency-based group. This difference measured by t -test is significant to the .01 level.

The levels of minimum competency in the merchandising computational areas and the forms used for tabulating student progress under the competency-based mode are included in Appendix E. The percentage of merchandising computational competencies achieved by Syracuse CB group than the Baruch traditional group achieved minimum competency on all the competencies analyzed.

The level of achievement expected had been made clear to Baruch instructors by sharing dummy problem formats in advance of testing. Therefore, the higher percentage of competency achievement by Syracuse CB group supports the hypothesis favoring the CB mode.

TABLE 31

PERCENTAGE OF MERCHANDISING COMPUTATIONAL COMPETENCIES ACHIEVED BY SYRACUSE
COMPETENCY-BASED AND BARUCH TRADITIONAL GROUPS

Module I			Module II			Module III			Module IV		
Comp. No.	Percentage		Comp. No.	Percentage		Comp. No.	Percentage		Comp. No.	Percentage	
	Syracuse C.B.	Baruch Trad.		Syracuse C.B.	Baruch Trad.		Syracuse C.B.	Baruch Trad.		Syracuse C.B.	Baruch Trad.
1.21	71	32	2.21 } 2.26 }	75	--	3.31	86	52	4.31 ROG	88	67
1.22	82	13	2.22	95	39	3.32	96	61	4.31 Antic. FOB	92	--
1.23	80	--	2.23	100	73	3.33	100	68	4.31 EOM	95	70
1.24	75	--	2.26 } 2.27 }	84	--	3.34	95	65	4.31 EOM	96	45
			2.29	82	--	3.35	96	81	4.31 Net.	88	61

Further demonstration of the effectiveness of the competency-based mode was illustrated by the high percentage of the merchandising competencies measured by the multiple choice and computational assessment techniques that students were able to achieve under this format within the traditional frame of one semester. More than 80 percent of the students achieved at the minimum (B) competency level in 19 of the 23 competencies.

Student achievement in the merchandising component was also examined by a comparison of competencies achieved in their final project. The criteria used to evaluate the projects are included in Appendix E. The entire sample of projects from all three groups was graded for this portion of the project. Details of student achievement by competency are included in Tables 4-6 of Appendix F. A summary of the percentage of students achieving competency on the final merchandising project in the three student groups is given in Table 32. The same data are charted in Table 32a.

The means variances and sample sizes for the Buffalo traditional, Syracuse traditional and Syracuse competency-based groups on competency attainment measured by the final merchandising project are given in Table 33.

The analysis of variance summary for the three groups on average competency attainment on merchandising project is given in Table 34.

The aposteriori comparisons for the three groups on average competency attainment on merchandising project using the Scheffe method are given in Table 35.

All comparisons between pairs of means are significant ($p < .05$). This would tend to support the conclusion that competency attainment by students in group 2, the Syracuse University competency-based group is significantly better ($p < .05$) than the competency attainment in either of the other two groups on competencies demonstrated in the final merchandising project.

Syracuse Instructor's Evaluation of the Merchandising and Retailing Project of Three Student Groups

After reading and evaluating the projects, the instructor is able to make the following general statements which should have some bearing on the outcome of the study.

The traditional group of projects in the Syracuse traditional group were generally quite good. There were many competencies left out, as was to be expected since the topical outline was not written using behavioral objectives.

The competency-based group covered the material in greater detail. Again, this was expected having been given specific competencies. Some originality seemed to have suffered in the effort by the student to make sure each competency was completed. Many students took advantage of the privilege of re-writing those sections in which they had not achieved competency. This privilege did allow for greater achievement.

The papers from the State College at Buffalo were quite different. Using the same criteria, few competencies were achieved.

TABLE 32

PERCENTAGE STUDENTS ACHIEVING COMPETENCY LEVEL ON FINAL MERCHANDISING
PROJECT CLASSIFIED BY COMPETENCY IN BUFFALO TRADITIONAL, SYRACUSE
TRADITIONAL AND SYRACUSE COMPETENCY-BASED PROGRAMS

Sample	Total	Buffalo Traditional		Syracuse Traditional		Syracuse Competency- Based	
		No. 29	%	No. 43	%	No. 47	%
Module	Competency						
I	Method Acctng.	18	62	36	83	23	49
	Profit and Loss	-		-		-	
	Dept. Oper. State Balance Sheet	21	72	24	56	32	68
		-		-		-	
	6 Mos. Plan	0	0	19	44	41	87
II	Method Mds. Manage.	14	48	41	95	37	79
	Open to Buy	10	34	30	70	39	83
III	Determine Initial Prices	1	3	20	47	26	55
	Policy Markdowns	14	48	43	100	40	85
	Pricing Decisions Gov't.	-		-		-	
IV	Method. Purch.	-		-		-	
	Choosing Markets	5	17	38	88	43	91
	Major Vendors	15	51	31	72	43	91
	Use Buy- ing Office	8	28	31	72	38	81

TABLE 32a

▨ Buffalo Traditional

□ Syracuse Traditional
GRAPHIC PRESENTATION

■ Syracuse Competency-Based

PERCENTAGE STUDENTS ACHIEVING COMPETENCY LEVEL ON FINAL MERCHANDISING
PROJECT CLASSIFIED BY COMPETENCY IN BUFFALO TRADITIONAL, SYRACUSE
TRADITIONAL AND SYRACUSE COMPETENCY-BASED PROGRAMS

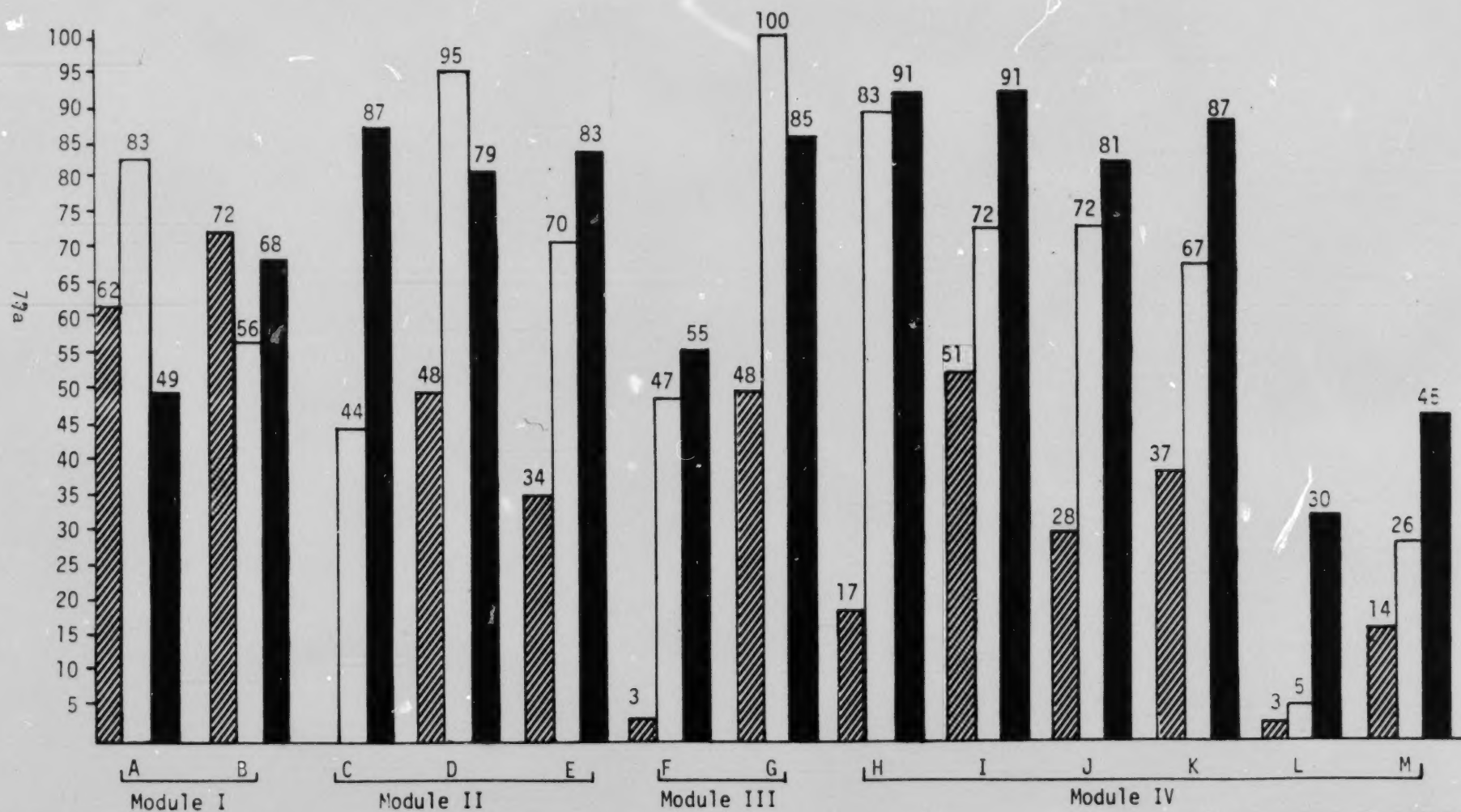


TABLE 32--Continued

Sample	Total	Buffalo Traditional		Syracuse Traditional		Syracuse Competency- Based	
		No. 29	%	No. 43	%	No. 47	%
Terms							
Sale							
Available		11	37	29	67	41	87
Sample							
Trip Buy.							
Plan		1	3	2	5	14	30
Receiving							
Mkt. and							
Distrib.		4	14	11	26	21	45

TABLE 33

MEANS, VARIANCES AND SAMPLE SIZES FOR THREE GROUPS ON
AVERAGE COMPETENCY ATTAINMENT IN MERCHANDISING
PROJECT

Group	X	S ²	N
Buffalo (1)	4.55	8.97	29
Syracuse University Competency (2)	10.47	4.34	47
Syracuse University Traditional (3)	9.21	4.22	43

TABLE 34

ANALYSIS OF VARIANCE SUMMARY FOR THREE GROUPS ON AVERAGE
COMPETENCY ATTAINMENT IN MERCHANDISING PROJECT

Source of Variation	Sum of Squares	d.f.	Mean Square	F	F.95
Between means	655.15	2	327.57	60.51	3.07
Within groups	627.99	116	5.41		
Total	1283.14	118			

TABLE 35

APOSTERIORI COMPARISONS FOR THREE GROUPS ON AVERAGE
COMPETENCY ATTAINMENT IN MERCHANDISING PROJECT
BY SCHEFFE METHOD

Group Mean	Group Code		
	1	2	3
4.55 (1)	-	115.98*	69.41*
10.47 (2)		-	6.57*
9.21 (3)			-

* $F_{.95}^1 = 6.14$
 $P < .05$

The differences in some cases were obvious to the Syracuse instructor and in others they were explained by the instructor at Buffalo:

1. The instructor at Syracuse had used a similar application for four previous years.
2. These were the first papers of this nature attempted by the Buffalo group.
3. The Buffalo group stressed personal observations for documentation, although the bibliography had been discussed in class by the instructor.
4. The Buffalo group produces some excellent papers. However, most were based on personal experiences rather than simulating their own business.

5. The instructor at Syracuse had built into the paper a research application in the traditional mode. A bibliography had been distributed; research publications had been discussed in class. The importance of retail research had been stressed. A class visit to the University Library combined with a lecture by the business bibliographer had been included in previous years. The competency program had the added use of the booklet "Selected Resources for Retail Research" and the added assignment of actually answering questions in each resource discussed in this booklet. They also had the benefit of stated competencies and criteria.
6. The Syracuse groups were told both in the traditional and competency mode that role-playing or simulating or designing an original business based on research, experience and observations was desired. These directions were printed on the topical outline for both Syracuse groups and the Buffalo group but the Syracuse instructor probably reinforced the directions in the classroom having the experience of using this assignment for four previous years.
7. The greatest differences were noted in the collection of statistics for documenting location and site problems. The Buffalo group was extremely weak. Statistics on expenses for their businesses were not given. Although they achieved in the objective merchandising tests, they were not able to apply figures in role-playing in merchandising their businesses. Most of the information in the paper was merely reported from the text or had no direct application to their chosen businesses.

Conclusions drawn by the instructor concerning the paper include:

1. Following competencies in writing the paper allows for more complete coverage of the subject. It allows the student to know how to organize the paper and draw upon information available.
2. The Research Handbook should have additional references added for use in the second set of modules. Students did not have use of the Handbook for the second semester. It would have been useful for new students and the instructor felt that it would have been valuable to have at least two other reference books including business data. Even though students had used the reference books the first semester, there was still some confusion on how to retrieve the needed data for the second set of modules.
3. Students who are enrolled in the second set of modules in the competency mode not having done the first set must be given extra personalized attention. The paper is not an easy assignment. Again, orientation to the competency mode is necessary.
4. Some of the differences between the Buffalo group and the Syracuse groups may reflect the type of classroom instruction and personal style of each instructor.
5. Although students, for four previous years at S.U. had said that this assignment was a difficult one, they always felt great satisfaction after completing it.

It was most gratifying to the instructor to have a greater number of students achieve, in this assignment, due to the competency based mode.

6. The Syracuse instructor is reinforced in the use of the papers as a learning tool in the competency-based program. It fulfills most of the needs of the competency mode as described by Weber and Rathbone. The paper "personalizes" each student's program by allowing him to "design" his own business, but gives the student all "the instructional objectives needed." The student makes his "own decisions" on how his business will take shape and be managed, based on his own research. The student is in effect simulating a "reality-based problem, but protects him from the potential consequences of an actual experience." "They provide a reality oriented approach to learning" (Weber and Rathbone, in Darault Anderson and Dickson, 1973, Competency Based Education).
7. The instructor feels that after the experience of writing these papers, the student is ready for the first application, the occupational work experience before student teaching.

Comparison of Student Groups in the Cooperative Fieldwork Component

A. Research Design

The cooperative fieldwork component was taught in the traditional mode, described earlier in this report in the fall of 1975. The field supervision and weekly seminars were handled by a teaching assistant with business background. The field placements were made by the former instructor who was also available for backup and consultation. It was planned to have the same assistant supervise both the traditional and competency-based formats of the program. However the assistant left at the end of the year and the former instructor supervised the competency-based mode taught in the fall of 1975. Field placements were made in the same stores but not in all of the same positions during both formats. The students' immediate supervisors in the stores were different due to store personnel changes and the different departments to which students were assigned.

In the traditional program there was no provision for specific skill performance rating of students by the store supervisors. A grade was given based on the college supervisor's observations and the store supervisor's response to an open-ended questionnaire (see Appendix C, Cooperative Work Report) which included such items as: How well has the student performed? What comments can you make about his effectiveness on the job? What traits may help or hinder the student's advancement? The competency-based format includes a more specific training format with provision for store supervisors' ratings. (See page 31.) The only comparison that can be made between the two groups then, on this dimension of their training is on the

percentage of students that took part in the various activities on which the competencies were based. This comparison is made on the assumption that if they did not take part in a given activity they could not possibly have achieved the competency. The source of activity participation data for the traditional group was the students' own written description of their store experiences in their final paper at the end of their fieldwork. This was subject to the limitations of their recall and some items may have been omitted, some daily activities considered so routine as not to be worth mentioning.* The human relations and communications skill checklist was revised to such an extent that direct comparisons are not valid. A competency on self evaluation was added to the competency-based format. Both the traditional and competency based groups had to submit a final paper. The criteria for evaluating the papers in the competency-based mode were applied to the traditional papers and a comparison made of the competencies achieved. Criteria for grading the paper are included in Appendix E.

B. Results

A much higher percentage of student participation was reported for all activities on which the competencies were based under the new format compared to the traditional one. The average student participation in all activities was 69.8 percent compared to 26.3 percent under the traditional mode. On the average, 94.5 percent of the students in the competency-based format participated in the required activities in Column I of the training plan. Only 56.2 percent of the traditional group reported participation in this same group of activities. All the Distributive Education students and 61 percent of the group participated in annual inventory in the competency-based format whereas none had participated the previous year under the traditional format. The group of activities in Column II of the training program, approximately half of which were required, were participated in by 62.6 percent of the competency-based group and only 18.5 percent of the traditional group, on the average. The activities listed in Column III, considered special opportunities, four of which were required, were participated in by 52.1 percent of the competency-based group and by only 4.9 percent of the traditional group on the average. Table 36 lists the percentage of student participation in field experience activities for both formats.

The first 24 competencies for the cooperative work experience were based on these activities, and students in order to achieve competency, were to demonstrate at least 80 percent of these competencies in a manner that would be judged at least "Good" by their supervisor on a scale of excellent, good, fair. Competency 21 which related to inventory was only required of distributive education students. Retailing majors treated it as a special opportunity. Sixty-one percent of the students, or 11 out of the 18 achieved competency during the time frame of one semester. Eighty-three percent of the group achieved the competencies based on activities in Column I of their training plan, all of which were required. Ninety-four percent of them achieved competency 24 based on the activities in Column III of the training plan. There was a problem in achieving competencies 17, 18, 19, 22 and 23 which were based on activities in Column II of the training plan. This was partly

* The college coordinator added any omitted activities she was aware of through student observation or seminar discussion.

TABLE 36

PERCENTAGE OF STUDENTS PARTICIPATING IN FIELDWORK ACTIVITIES ON WHICH
COMPETENCIES WERE BASED IN SYRACUSE TRADITIONAL AND
COMPETENCY-BASED PROGRAM

Activity	Percentage Student Participation	
	Traditional	Competency-Based
<u>SALES:</u>		
Customer service program	38	100
Floor, mail, telephone and/or catalog	100	100
Returned merchandise proc.	46	89
Operate a cash register	42	94
Knowledge of merchandise	54	100
Cash and charge procedures	100	100
<u>STOCK:</u>		
Transfers	77	89
Markdowns-record keeping	73	94
Fill-ins - a) storage } b) other }	69	100
Counts - periodic or daily	58	100
Put away and re-arrange merchandise	77	100
Housekeeping	58	100
Loss prevention own area	27	94
<u>DISPLAY:</u>		
Responsible for at least one display, i.e. point of sale, window, other	46	100
<u>SUPERVISION:</u>		
Scheduling (part responsibility)	23	78
Merchandise information	12	78
<u>INVENTORY:</u>		
Annual inventory (D.E. majors only, later date if necessary)	0	61
<u>RECEIVING:</u>		
Receipt of goods process	30	94
Types of marking, coding	-	94
Distribution of goods	27	78
<u>CONTROL/RECORD-KEEPING:</u>		
Basic stock control	15	100
Fashion control	4	55
Computer printouts	4	50
Sign requisitions	27	61
Re-ticket merchandise	35	94
Markdowns	73	94

TABLE 36--Continued

Activity	Percentage Student Participation	
	Traditional	Competency-Based
MERCHANDISING:		
Write and extend orders	8	61
Write special orders	19	44
On order file	0	44
Buying merchandising plan	16	55
Open to buy	-	33
Vendor's presentations	8	28
Merchandising process (i.e., markdowns, pricing, buying)	4	83
Classification/merchandising	-	61
Visit parent suburban store	12	72
SUPERVISION:		
Cash registers-beyond own	42	55
Supplies - ordering	30	50
Customer Service-beyond own	27	72
Authorization responsibility	19	39
Train new or seasonal personnel (part responsibility)	23	44
Loss prevention-beyond own	27	33
Merchandise information for dept. (i.e., ads/tear sheets, catalogs, sales coordinate merchandise and signs)	12	72
Observe sales promotion procedures	-	83
Observe sales audit dept.	4	44
Observe purchase journal	8	61
Visit distribution center	0	33
Attend store meetings, buyers, advertising, operations	8	72
Comparative shopping	8	55
Shopping employees	4	22
Special events	23	39
Set sales quotas	4	44
Figure commissions	-	89
Annual inventory	0	61
Other operational activities (i.e., restaurants, etc.)	59	22

due to lack of student initiative, partly due to the lack of awareness and commitment on the part of some supervisors, partly due to variation in reporting methods. The process for reporting student achievement and criteria for evaluation need to be clarified for more reliable results. The format appeared sound, and expectations reasonable, but more time is necessary for the implementation of this part of the competency-based program at the level desired. Details of student achievement on these competencies appear in Appendix F.

The seven competencies that were to be expressed in writing and evaluated using the specific criteria described in Appendix E were presented in a final paper by the students. The percentage of students achieving competency level on this cooperative fieldwork paper in the Syracuse traditional and Syracuse competency-based mode are presented in Table 37.

TABLE 37

PERCENTAGE OF STUDENTS ACHIEVING COMPETENCY LEVEL ON FINAL
COOPERATIVE FIELDWORK PAPER IN SYRACUSE TRADITIONAL AND
SYRACUSE COMPETENCY-BASED PROGRAMS

Competency Number	Syracuse Traditional		Group Syracuse Competency-based	
	No.	%	No.	%
1	6	23	17	100
2	14	54	17	100
3	2	8	12	71
4	1	4	15	88
5	22	85	15	88
6	19	73	17	100
7	13	50	15	88

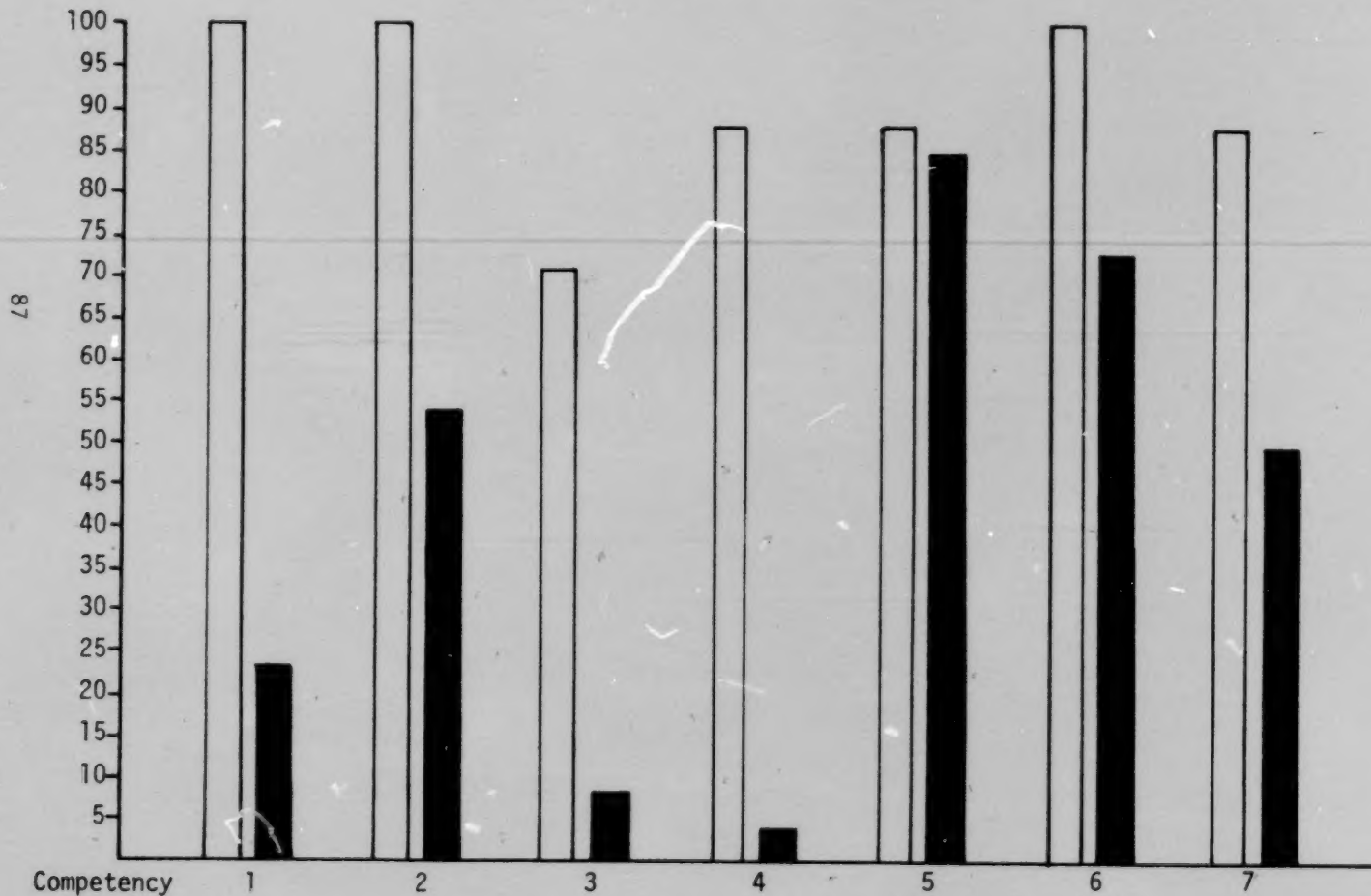
A chi-square test was used to measure the significance of the difference in competency achievement between the two groups. X^2 was computed to be 21.937 which with 6 degrees of freedom showed a difference significant beyond the point .01 level between the two groups. The differences by competency are illustrated in a bar chart in Table 38. The last two competencies related to human relations and communications skills. Students were rated by themselves, their college supervisor, and the immediate supervisor in their store placement on 15 skills with the checklist included in Appendix E. Competency level on the first competency required students to demonstrate all 15 skills in a manner that would earn them an average rating of at least three points on a five point scale from both their immediate store supervisor and their college coordinator. Eighty-three percent of the students met this competency. The other competency in this area required the students to realistically evaluate their own human relations and communications skills so that their score on the checklist did not vary by more than one point overall from the average score of their two supervisors. Ninety-four percent of the

students achieved this competency. The checklist had been sufficiently changed from the one used in the traditional program that comparisons of student ratings were not possible. No self-evaluation had been required in the traditional program.

Table 38

GRAPHIC PRESENTATION
PERCENTAGE STUDENTS ACHIEVING COMPETENCY LEVEL ON FINAL CO-OPERATIVE FIELDWORK
PAPER IN SYRACUSE TRADITIONAL AND SYRACUSE COMPETENCY-BASED PROGRAMS

□ Syracuse Competency Based ■ Syracuse Traditional



CHAPTER IV

SUMMARY AND CONCLUSIONS

The primary objective of the Syracuse project was to make an empirical determination of the effectiveness of a competency-based program compared to a non-competency based program by comparing student achievement in some major components in the pre-service distributive teacher education program. In order to do this, these components had to be put in competency-based format and implemented into the existing program. This chapter will summarize the staff accomplishments following the general format of the objectives of the project, described both in the original proposal and in the first chapter of this report.

Objective 1:

This objective was to redesign the traditional Distributive program at Syracuse University in a personalized performance and competency-based format with varying degrees of detail for different program components. The three components selected for major focus in the project were retailing, merchandising and occupational work experience because these are the three components which form the core of the program and which undergird the new secondary curriculum in Distributive Education in New York State. These components are all taught in the College for Human Development and are under the supervision of the retailing and distributive education faculty. The retailing and merchandising components were competency-based in the first year of the project, the occupational work experience component was completed in the final six months of the project. The competencies developed were validated by comparison with the technical objectives of the Lucy Crawford research study (Crawford 1968) and by a group of local and New York State reactors including distributive education teachers, public school administrators, businessmen and students. An analysis of the congruence of these competencies with the New York State Curriculum in Distribution and Marketing demonstrated their strength as preparation for teachers of this curriculum.

It was hypothesized that competency-basing by the "program translation" method would make possible implementation of the competency-based components within the limited time frame permitted by the project. This proved to be the case as retailing and merchandising were taught in the competency-based format in the fall of 1974 and spring of 1975. Details of the development of the format and its implementation are included in the body of the report. This has not been done without a great deal of extra time and effort on the part of the instructor, but the researcher has not been thrown out!

Conclusions of the instructor as they related to the issue of management in implementation of competency-based programs were as follows:

1. Students were not accustomed to being given expected competencies in writing.
2. Students were not accustomed to studying and writing to specific expected competencies.
3. Students who were not majors in the field and did not care to earn credit hours did not make up their incompletes.
4. Students constantly asked questions, the answers for which were included in the syllabus. Some students did not think the directions were sufficiently explicit.
5. Organization and management became an important factor in the competency based program.
 - a. Management of resource materials--availability in the library.
 - b. Organization of records.
 - c. Translation of the criteria for competencies to grades for the purpose of transcript record consistency. Students were extremely grade conscious.

The professional education component for the Distributive Education program was to be tailored in the light of the School of Education Project Re-Design. This is a plan to bring together the many secondary teacher training programs at Syracuse University into a coordinated field oriented personalized competency-based teacher education program. The set of competencies they develop using the "Theoretical" method of Houston (Houston 1972) will reflect the school's hypotheses about the "effective teacher" and provide the integrative mechanisms to implement the program. Development in this component has not been as rapid as was anticipated at the outset of this project. However, the orientation admissions component has been competency-based and implemented with good feedback. The Distributive Education students are having their "first hand investigation of programs in their intended major" by working with school stores, DECCA clubs and tutoring individual secondary distributive education students. A profiling system has been developed. Three hour courses have been done away with in favor of mini-courses and modules. A consortia is being developed to follow through and translate the theoretical aspects of the program into performance application and provide field measures of effectiveness. At this point in time the traditional student-teaching experience is still the mode and competencies have not been finally defined nor empirically tested.

Competency basing in the other distributive program components has been minimal. The chief researcher has cooperated with the Maxwell School of Citizenship in developing a set of competencies in the social sciences required by professional schools. Low scores in math diagnostic tests have led to the new program requirement that students take accounting to improve competencies in this area as a prerequisite for the merchandising component.

Objective 2:

In the retailing component, one entire module on "Retail Research" was developed in independent study form including the development of a booklet "Selected Resources for Retail Research," included in Appendix . This

project was well received according to student evaluation and is considered to be one of the contributing factors in the improved student achievement under the competency-based mode. The major suggestion was to expand it and include more resources appropriate to the merchandising area as well.

The independent study options in the merchandising component were based primarily on programmed booklets already prepared in the department. Very few students selected these options although the materials were used for support and review.

Objective 3:

One of the major considerations in developing the assessment techniques used in evaluating student achievement was to use those that would be useful in comparing students taught similar content in a traditional course-credit mode. Multiple choice tests, computational problems and a project which required students to simulate a business of their own and apply principles learned, were used. Very specific criteria were developed for evaluating the latter. Test items were carefully keyed to competencies, and minimum competency levels established.

Objective 4:

a) Retailing and Merchandising Components

The retailing and merchandising components had been taught at Syracuse during the academic year 1973-1974 in the traditional mode. These same components were taught to a similar group of students with the same instructor and textbook in a competency-based mode in the academic year 1974-1975. Although the assessment procedures in the competency-based mode were kept as close to traditional methods as possible, for comparative purposes, they did need to be refined and improved to be effective for the new format. Comparable programs at other colleges, still teaching in the traditional mode, were selected and agreed to use the assessment procedures developed for the competency-based mode in their own programs in 1974-1975. Student groups at the State University College at Buffalo in the Department of Consumer and Business Studies under the chairmanship of Dr. Allan Korn cooperated in the study. Two other student groups and instructors at Baruch College of the City University of New York in the Retailing program in the Department of Marketing under the supervision of Dr. Irving Burstiner also participated.

The opportunity also arose in the fall of 1975 to teach the retailing component at Syracuse, again. There had been such strong support of the hypothesis that students achieve at a higher level under the competency-based mode already in the project that it was decided to re-teach the retailing component in the traditional mode. This would further test the hypothesis that differences in student achievement were attributable to differences in format rather than differences in instructors.

Altogether the retailing component was taught to four student groups, once in the competency-based mode at Syracuse, three times in the traditional mode, at Syracuse in 1973 and 1975 and at Buffalo in 1974. The merchandising component was also taught to four groups, once in the competency-based mode at Syracuse, three times in the traditional mode, at Syracuse, Buffalo and Baruch.

The following conclusions can be drawn about student achievement in the competency-based mode compared to the traditional mode in the retailing and merchandising components of the Distribution Education program as a result of the current project.

1. The student groups were compared on the basis of the student characteristics of major-non-major status, class, SAT verbal and SAT math scores, grade point average at the end of the semester in which the component studied was taken, and scores on a 10-item diagnostic math test. The general conclusion on the basis of the analysis of variance and chi-square testing is that there is no reason to suppose that the four groups of students differed before taking the retailing component. Any slight difference in scores tended to favor the Syracuse Traditional I group of 1973. Similarly, with the four student groups who took the merchandising component, there is no evidence that differences in student achievement could be attributed to different student characteristics.
2. Instructors were evaluated by the student groups with an OMNIQUEST form similar to those used by the Syracuse Center for Instructional Development. A standardized Instructional Rating Survey (IRS) used university-wide at Syracuse and the University of Illinois CEQ forms were also used. Teacher evaluation data was not collected at Buffalo. The data reported gave no evidence that the superior student achievement of students in the competency-based mode could be attributed to differences in instructors. Their resumes are included in Appendix .
3. In the retailing component there were 28 multiple choice questions common to the tests for all four student groups. The mean difficulty level on the 28 items for the groups were: Buffalo traditional, 54.82; Syracuse traditional II, 62.25; Syracuse Traditional I, 70.89; Syracuse competency-based format, 76.82. The mean student scores were 15.7 for Buffalo, 17.5 for Syracuse Traditional II and 21.7 for Syracuse competency-based groups. An analysis of variance and aposteriori comparisons of student scores on these 28 items for the three groups showed significant differences at the .01 level between the groups. These results support the conclusion that the Syracuse University competency-based group scored significantly higher on these 28 multiple choice items.
4. The total number of multiple choice items developed for assessment in all the modules of the Syracuse competency-based format was 74. Some of these items related to competencies that other instructors felt they had not included in their programs and so they were omitted from the analysis. Altogether there were 69 items taken

in common with mean student scores being 42.60 for the Buffalo traditional group, 44.75 for the Syracuse University traditional II group and 54.33 for the Syracuse University competency-based group. Student scores for the latter group are significantly ($p < .01$) higher than the scores in either of the traditional groups. More than 70 percent of the Syracuse competency-based group was able to achieve competency on 16 out of the 19 competencies in the retailing component during one semester. The competency-based mode characteristic of permitting makeups on tests was very important in the high levels of student achievement. There were only three competencies on which more than 70 percent of the Buffalo traditional group got all the questions correct, the Syracuse traditional II group reached this level on seven competencies. This would tend to support the conclusion that students achieved better on this test under the competency-based format than under the traditional format.

5. Student achievement in the retailing component was also examined by a comparison of competencies achieved in their final project simulating the establishment of a business. All four groups submitted projects. All comparisons between pairs of means are significant using the Fisher F test and Scheffe method for *aposteriori* comparisons. This would indicate that competency attainment by students in the Syracuse competency-group is significantly greater ($p < .01$) than the competency attainment in any of the other three groups.
6. In the merchandising component, there were no multiple choice questions in the Syracuse traditional format. The questions developed for the competency-based mode, 60 in all, were administered in part at Buffalo and Baruch in the traditional mode. There seemed to be more variation in the content in merchandising theory and principles than elsewhere. Only 34 of the questions were used in common by the three groups. The test administration methods at Buffalo allowed access to materials that made the results questionable. The average student scores on the 49 items common to the Baruch traditional and Syracuse competency-based groups were 31.68 and 36.38 respectively. The t-test statistic showed these means to be significantly different at the .01 level. This supports the hypotheses that students achieved better under the competency based mode. However data on Baruch student characteristics with the exception of scores on a diagnostic math test which favored Baruch, were limited. The conclusion based on this part of the data is thus only tentative.
7. The computational competencies in the merchandising component were assessed by problem formats in all four groups, Syracuse traditional, Syracuse competency-based, Buffalo and Baruch. Open book procedures were used in the Buffalo program for this section so the data were not usable. Two procedures were used to compare the S.U. competency-based modes.

Procedure I: Common elements in tests for S.U. traditional and S.U. competency-based groups were graded by 1975 criteria. The criteria were adjusted so non-similar elements were eliminated. The result was a comparable numerical test score for each group.

Procedure II: Common elements in tests for S.U. traditional and S.U. competency-based groups were graded by 1974 criteria. The criteria were adjusted so non-similar elements were eliminated. The result was a comparable numerical test score for each group.

In Mod I there were enough student tests available from the traditional group to apply both Procedures. Both showed that students performed better under the competency-based mode. The analysis using the t test with Procedure I was significant at the .05 level, the analysis at .01 level using Procedure II. Similar results using Procedure II on tests two and three gave evidence of better student performance under the competency-based mode at the .01 level of significance, using the t test to measure the difference between the means.

The Baruch group excluded some competencies as was their option. Their average student score on the computational competencies completed was 47.8 compared to the average student score of the Syracuse competency-based group which was 69.3. This difference is significant at the .01 level. A higher percentage of the Syracuse competency-based group achieved competency level on all competencies analyzed than the Baruch group.

9. The application competencies assessed by the final projects for the merchandising component were analyzed for student competency attainment for all three student groups. All comparisons between pairs of means using the Fisher F score and the Scheffe method for aposteriori comparisons were significant at the .05 level giving support to the conclusion that competency attainment by students in the competency-based group is significantly higher ($p < .05$) than the competency attainment in either of the two groups. (Syr. Trad. I or Buffalo)
10. The instructor made the following observations after reading the papers from all three groups. (Syr. CB, Trad. I and Buffalo)
 - a. Following competencies in writing the paper allows for more complete coverage of the subject. The student should know exactly how to organize the paper and draw upon information available.
 - b. The booklet "Selected Resources for Retail Research" should have additional references.
 - c. Students who enroll in the second set of modules in the competency mode not having done the first set must be given extra personalized attention to familiarize them with the format.

b) Cooperative Fieldwork Experience

The cooperative fieldwork component was taught in the traditional mode, described in the body of the report in the fall of 1974, and in a competency-based format in the fall of 1975. A much higher percentage of student participation was reported for all activities on which the competencies were based under the new format compared to the traditional one. The average student participation in all activities was 69.8 percent compared to 26.3 percent under the traditional mode.

A final paper evaluated the seven competencies that were to be expressed in writing. A chi-square test showed a significant difference at the .01 level in the competency achievement favoring the competency-based group.

The final two competencies related to human relations and communications skills. The assessment instruments were sufficiently changed that comparison between the two groups was not possible.

Overall, only two-thirds of the students achieved 80 percent or more of the competencies in the competency-based mode. This would indicate that more work needs to be done to improve the implementation of the competency-based mode. Implementing a competency-based format for the cooperative work experience involves working with a number of people in addition to the college supervisor, including many store supervisors and managers. The successful implementation of such a new format in this component takes more time than in the components such as retailing and merchandising where the researcher need only work with one instructor. The students did much better under the competency-based format, but the level of achievement is still not as high as desired.

In summary, it was possible to competency-base and implement two major content components and one occupational field based component of the Distributive Education component using Houston's "program translation" method within a time span of 18 months.

The retailing component was taught to four groups: three in the traditional mode, Syracuse I (1973), Syracuse II (1975) and Buffalo (1975) and one in competency-based mode at Syracuse (1974). Student achievement was compared between groups by a set of multiple choice questions and by a final project in retail simulation. Results showed significant difference in student achievement at .01 level favoring the competency-based group above the other three for both methods of assessment. An independent study booklet "Selected Resources for Retail Research" found in Appendix D, was developed.

The merchandising component was also taught to four groups: three in the traditional mode, Syracuse (1974), Buffalo (1975) and Baruch (1975) and one in the competency-based mode at Syracuse (1975). Student achievement was compared between groups by multiple choice questions, computational problems and a final project in retail simulation. Results comparing the competency-based group with the other groups significantly favored the competency-based groups. Multiple choice and computational problem assessment comparisons were significant at the .01 level. Comparisons of achievement on final merchandising project were significant at .05 level. Care was taken to demonstrate that for the groups studied, differences in student achievement could not be attributed to differences between groups in student characteristics, instructors or content.

Students demonstrated marked improvement under the competency-based field-work component showing a significant difference at .01 level in participation in business activities on which competencies were based. Written competencies were also significantly different at .01 level favoring the competency-based group. However the level of achievement with only two-thirds of the students achieving 80 percent or more of all the competencies required in this component is not as high as desired.

The results of this study give strong empirical evidence of improved student achievement under competency-based format for the program components studied. Student reaction to the new mode was favorable.

APPENDIX A

COMPETENCY STATEMENTS AND TRADITIONAL COURSE OUTLINES
FOR MERCHANDISING AND RETAILING COMPONENTS
AND COOPERATIVE WORK EXPERIENCE
MATERIALS

TIME SCHEDULE FOR SYRACUSE COMPETENCY-
BASED RETAILING COMPONENT

RETAILING
MWF 10:40 a.m.

Fall
1974

MODULE	CONTENT	QUIZ	PROJECT DUE
I Introduction Retail	Sept. 9-27	--	--
II Retail Research	Sept. 30	--	Oct. 9
III Store Location	Oct. 7-11	M Test Oct. 14 I, III	M Oct. 21
IV Store Building	Oct. 14-18	F Oct. 25	M Oct. 28
V Retail Or- ganization	Oct. 21 - Nov. 1 Field Trip	F Nov. 8	M Nov. 11
VI Sales, Ad- vertising & Display	Nov. 4-15	M Nov. 18	M Nov. 25
VII Customer Service	Nov. 18-22	M Dec. 2	M Dec. 9
Retail Credit	Nov. 25-27		
VIII Introd. to Control	Dec. 2-11	W Dec. 11	M Dec. 16 Make-ups 1 - 3 p.m.

Exam period: Dec. 13-20

TRADITIONAL COURSE OUTLINE S.U., FALL SEMESTER 1974

RET 275: Principles of Retailing

Text: Modern Retailing Management, Basic Concepts and Practices,
Duncan, Phillips, Hollander. Eighth Edition, 1972, Irwin, Inc.

Aug. 31	Orientation. Part VIII, Chap. 26 Retail Research
Sept. 3	Labor Day, no classes
Sept. 5	Conclusion of Chap. 26
Sept. 10	Part I, Chap. I Retailing Today
Sept. 17	Part II, Chap. 2, 3, Retail Management and Career Opportunities Speaker to be announced
Sept. 24	Part III, Chap. 4 Store Location
Oct. 1	Chap. 5, 6. The Store Building, Fixtures Layouts
Oct. 8	Part IV, Chap. 7, Retail Organization Field trip to be announced
Oct. 15	Chap. 8, 9. Retail Personnel Management
Oct. 22	Examination
Oct. 24	Part VI, Sales Promotion, Chap. 18 Retail Advertising, Display
Oct. 29	Chap. 10, 20. Sales Promotion, Personal Salesmanship
Nov. 5	Chap. 21, Customer Services
Nov. 12	Chap. 22, Retail Credit
Nov. 19	Part VII, Control, Chap. 24, Expense Control
Nov. 21	Thanksgiving Vacation
Nov. 26	Expense Control, Chap. 25, Control of Sales Transactions Speaker to be announced
Dec.	To be assigned
Dec. 10	To be assigned
Dec. 14	Paper due. Last Class
Dec. 21	Last Day of Exams
Dec. 22-Jan. 8	Intersession

This outline must be flexible in order to schedule speakers and field trips. Advance notice will be given in case of change. Notices will also be posted on the door of Room 311.

Papers are due on day stated, they are considered late after due date.

Attendance is mandatory when guest speakers are scheduled.

Attendance is required for local field trips.

COMPETENCY STATEMENTS DEVELOPED FOR SYRACUSE
RETAILING COMPONENT

MODULE 1

The Structure and Environment of Retailing Today

Upon completing the learning experiences described in the course outline for Retailing 275.....you will be able to do the following:

- 1.1 Demonstrate knowledge of retail terminology by
 - 1.11 Defining retailing in formal and slang terms
 - 1.12 Listing the elements of the retail mix
 - 1.13 Identifying different types of retail institutions in terms of the elements of the retail mix and describe how and why they evolved
 - 1.14 Describing four methods of retailing, over-the-counter, mail or telephone, direct, vending
- 1.2 Demonstrate knowledge of the relationship between the retail industry and the economy in general by
 - 1.21 Listing and describing the societal forces arising since 1940 that have made retailing what it is today (e.g., societal economic, technical, and others)
 - 1.22 Describing the impact of retailing on the economy of the United States
 - 1.23 Citing at least 5 basic statistics about the retailing industry
 - 1.24 Describing McNair's theory of institutional change known as "The Wheel of Retailing"
- 1.3 Discuss key determinants of successful management including:
 - 1.31 Personal characteristics
 - 1.32 Social responsibility
 - 1.33 Capital requirements and
 - 1.34 Policy and procedure development
- 1.4 List the advantages and disadvantages of employment and training opportunities in the field of retailing.
- 1.5 Select an event reported in current media, journals, theater or society with present or future significance for retailing, and analyze its implications for future retail decisions in a five-minute oral presentation before the class. (The presentation must not include reading the media item itself.)

MODULE 2

Research in Retailing

Upon completing the learning experiences described in the course outline for retail research, you will be able to do the following:

- 2.1 Select from current newspapers and periodicals, articles which have current or future importance to the field of retailing and analyze their significance.
- 2.2 Locate and analyze data pertaining to stated problems in retailing from selected periodicals such as: JOURNAL OF RETAILING, WOMEN'S WEAR DAILY, NEW YORK TIMES, WALL STREET JOURNAL, NEWSWEEK and TIME magazine.
- 2.3 Locate and analyze demographic data from U.S. Department of Commerce and Bureau of the Census publications to evaluate site locations, market segmentation and competitive conditions for retail institutions.
- 2.4 Locate and analyze financial data from business publications such as Dun and Bradstreet, Fairchild's FINANCIAL ANALYSIS, EDITOR AND PUBLISHER'S MARKET GUIDE, and others, in order to estimate sales per square foot; expense for sales promotion, salaries and other business data for retail institutions.
- 2.5 Use "Small Business Administration" publications to research topics included in Modules 1 through 8.

MODULE 3

Retail Location

Upon completing the learning experiences described in the course outline for Retail Location, you will be able to do the following:

- 3.1 Demonstrate knowledge of retail terminology and principles as they relate to store location by
 - 3.11 Describing the basic factors in location of the retail business as they relate to the general and immediate trading area and the specific site.
 - 3.12 Describing characteristics of the trading area (i.e., Industry, Population, Progressiveness, Buying Habits of Customers, Purchasing Power, Level of Income, Competition, State and Local Legislation).
 - 3.13 Distinguishing between "central business district" (CED) and "metropolitan area."
 - 3.14 Describing the following locations from the Central Business District to the suburbs (Gist): a. core; b. frame; c. strip or radial; d. intersecting sites; e. peripheral; f. external.

- 3.15 Describing sites that fall into like clusters (i.e., Isolated Location, Convenience-Goods Cluster, Shopping-Goods Cluster, Combination Comparison Convenience Cluster).
- 3.16 Describing the major characteristics of free-standing stores, regional shopping centers, community shopping centers and neighborhood shopping centers.
- 3.2 Demonstrate knowledge of trends in the American society that relate to retail location by
 - 3.21 Stating the reasons for decentralization of retailing and the move to the suburbs.
 - 3.22 Describing current trends in store locations and the probable impact on the future.
- 3.3 Describe methods for determining advantages and disadvantages of a specific site related to: a. estimated volume of business; b. customer buying habits, e.g., hard goods, soft goods, shopping goods, convenience goods, fashion items; c. customer traffic; d. competition; e. accessibility; f. physical characteristics. Collect data on one of them.
- 3.4 Choose a specific type of retail business to design on paper. The retail business may be a whole store or a department within a store. The rationale for choice will be described specifically in terms of the elements of the retail mix.

MODULE 4

Store Building

Upon completing the learning experiences described in the course outline for the Module on Store Building as they relate to general building features, you will be able to do the following:

- 4.1 Demonstrate knowledge of terminology and principles in retailing as they relate to the store building by
 - 4.11 Identifying the characteristics of each of the store building features that are important to the customer (e.g., front, entrance, windows, interior, fixtures, lighting, traffic, air conditioning).
 - 4.111 Distinguishing between "fixtures" and "equipment"
 - 4.12 Describing the image that will reflect a given type of store
 - 4.121 Selecting building features that reflect a stated image for a given market.
 - 4.13 Describing the characteristics that make up good building design for a given type of store in a specific location
 - 4.131 Analyzing the factors that relate to total building design or a specific feature in a given store and justify the choice between modernization vs. new building.
 - 4.14 Listing new trends in store buildings
- 4.2 Demonstrate knowledge of terminology and principles in retailing as they relate to store layout

- 4.21 Defining the term "layout" as it relates to the retail business.
- 4.22 Giving examples of selling and non-selling areas in a given retail institution.
- 4.23 Locating all the major components of layout within a specific store.
- 4.24 Listing sources of assistance in designing layout.
- 4.25 Identifying factors for good layout from both customers' and retailers' point of view.
- 4.26 Describing types of layout design common to various types of retail institutions.
- 4.27 Listing ways to collect and analyze data to justify a layout decision for a given retail institution.
- 4.3 Demonstrate knowledge of terminology and principles in retailing as they relate to display by
 - 4.31 Defining the purpose of interior display in a retail business.
 - 4.32 Listing the differences in interior display in the major types of stores (e.g., High margin-low turnover, Low margin-high turnover, Food and drug stores, Variety stores and others).
 - 4.33 Differentiating between self-service and self-selection merchandising.
 - 4.34 Describing the correct way to use display fixtures for different styles of selling merchandise (e.g., cases, point of sale, signs, aisle tables, self-service, self-selection).

You will have the opportunity to study display more intensively in a future Module on Sales Promotion as it is a major responsibility of that division in the organization of a retail store.

- 4.4 Choosing the appointments of the physical plant, fixtures, lighting and decor of the retail business you selected and justifying decisions on the basis of principles in components 1.0 and 4.0 (layout will be demonstrated by drawing a diagram for the business selected, with all decisions justified on the basis of principles in Components 1.0 and 4.0).

MODULE 5

Retail Organization

Upon completing the learning experience described in the course outline for the Module on Retail Organization you will be able to do the following:

- 5.1 Demonstrate knowledge of terminology and principles in retailing as they relate to organization by:

- 5.11 Defining "organization."
- 5.12 Distinguishing between the "departmentalization" and the "shoppe" concept.
- 5.13 Describing the organizational activities for small department stores, medium and large department stores and chain stores.
- 5.14 Identifying the characteristics of a branch store and its relationship to the parent store.
- 5.15 Discussing the reasons for the separation of buying and selling responsibilities in a retail institution.
- 5.16 Identifying the characteristics of ownership groups.
- 5.17 Discussing decentralization and centralization of the most common retail organizations such as: a. small and large department stores; b. small and large chain stores.
- 5.2 Demonstrate knowledge of terminology and principles in retailing as they relate to personnel management by:
 - 5.21 Defining the needs and activities of personnel management.
 - 5.22 Identifying the most important areas of personnel policies.
 - 5.23 Describing training plans for all types of employees (i.e., selling, non-selling, junior executives and part-time).
 - 5.24 Describing methods of compensation for all types of employees.
 - 5.25 Listing alternate ways of evaluating employees and handling problems such as promotions, transfers, demotions and terminations.
 - 5.26 Listing examples of types of employee benefits and fringe benefits.
 - 5.27 Describing the current status of labor unions in retailing.
 - 5.28 Locating State and Federal wage and hour laws and other laws that relate to minors and the retail trades.
- 5.3 Applying the principles of retail organization and personnel management by developing an organization plan and description of the personnel needs for the retailing institution you have chosen.

MODULE 6

Sales Promotion

Upon completion of the learning experiences described in the course outline for Module 6 on Sales, Advertising and Display, you will be able to do the following:

- 6.1 Demonstrate knowledge of terminology and principles in retailing as they relate to sales promotion by: distinguishing between personal and non-personal selling.
- 6.2 Demonstrate knowledge of terminology and principles in retailing as they relate to advertising by:
 - 6.21 Distinguishing between advertising and publicity.
 - 6.22 Describing advantages and limitations of advertising to the retailer.
 - 6.23 Classifying given advertisements according to type (i.e., promotional [direct], institutional [indirect], or combination).

- 6.24 Describing advantages and disadvantages of methods of financing advertising (i.e., cooperative [vertical], single source [horizontal]).
- 6.25 Defining "copy" and "illustration."
- 6.26 Identifying preferred sections of newspapers and priority positions in newspapers, both on pages and between pages.
- 6.27 Distinguishing between different types of media for retail advertising.
- 6.28 Describing three types of special events and alternative strategies for handling them (i.e., distress, turnover, promotion).
 - 6.281 Listing agencies at federal level that administer regulations relating to retail institutions (i.e., FTC, IRS).
 - 6.282 Listing the main provisions of major consumer protection bills that relate to retail advertising and sales (i.e., Truth in Advertising, Consumer Protection Bill, Food Drug & Cosmetic Act).
- 6.29 Describing legislation that relates to retail advertising.
- 6.3 Applying knowledge of terminology and principles of advertising by:
 - 6.31 Planning an advertising budget for a given department or store including a. outlining the methodology for planning ahead for an advertising budget for one year, b. building a sales promotion calendar, c. documenting the sources of data for the process and for data on media costs.
 - 6.32 Selecting appropriate media for given types of advertisements and merchandise.
- 6.4 Demonstrate knowledge of terminology and principles in retailing as they relate to sales by:
 - 6.41 Listing the advantages and disadvantages of telephone and mail order selling from both buyers' and sellers' point of view.
 - 6.411 Listing different situations where telephone or mail order selling will be profitable.
 - 6.42 Describing examples of current emphasis or packaging with a reason for each example.
 - 6.43 Listing ways labelling promotes sales.
 - 6.44 Listing provisions of the "Truth in Packaging Act."
 - 6.45 Describing advantages and disadvantages of consumer premiums for retailer and consumer.
 - 6.46 Describing current status of personal salesmanship in retail sales.
 - 6.47 Describing ways to improve retail salesmanship.
 - 6.48 Describing the interrelationships between the four basic elements in any retail sale (i.e., store and policies, customer, merchandise, and sales person).
 - 6.49 Describing the steps in the selling process in sequence.
- 6.5 Synthesize knowledge of terminology and principles of retailing as they relate to sales promotion by developing the sales promotion

strategies for the retail business you have chosen that are consistent with these principles. Include presentation of a promotional calendar based on these strategies. Calculate the approximate costs of advertising placed in chosen media, documenting data sources in all cases.

MODULE 7

Customer Services

Upon completion of the learning experiences described in the course outline for Module 7, Customer Services, you will be able to do the following:

- 7.1 Demonstrate knowledge of terminology and principles in retailing as they relate to customer services by:
 - 7.11 Identifying basic customer services such as a. free, b. charged for, and c. income producing.
 - 7.12 Describing the implications of these customer services as they relate to store image, profit, and cost.
 - 7.13 Identifying customer service policy decisions as they relate to store image, profit and cost.
 - 7.14 Identifying the most common customer services in a retail store (i.e., alterations, wrapping, delivery, adjustments).
 - 7.15 Given a type of customer service, the student will be able to select from among alternatives, the type of store for which the service is appropriate.
- 7.2 Demonstrate knowledge of terminology and principles in retailing as they relate to retail credit by:
 - 7.21 Describing the advantages and disadvantages of credit to retail sales.
 - 7.211 Citing statistics on the scope of credit in retail sales.
 - 7.22 Defining the various types of retail credit contracts (i.e., open account, installment credit, general credit contracts, revolving credit, option terms).
 - 7.23 Distinguishing between non-store credit institutions and their credit plans and store credit plans.
 - 7.24 Describing management's role in the credit department of a store (i.e., credit promotion, account opening procedures, maintenance credit information, identifying credit customers, etc.).
 - 7.25 Describing major billing procedures and the contribution of automation to each (i.e., cycle billing, "Country Club" billing, descriptive billing).
 - 7.26 Describing advantages and disadvantages of alternative policies and procedures for collection management.
 - 7.27 Describing implications of government legislation on retail consumer credit.
 - 7.271 Citing provisions of the 1968 Consumer Credit Protection Act ("Truth in Lending Law").
 - 7.272 Stating the law as it pertains to credit card controls.
 - 7.273 Discussing the "Fair Credit Reporting Act."

- 7.3 Applying the principles of retailing as they apply to customer services, selecting customer services for the retail business you have chosen and analyzing your selections as they relate to the retail mix.
- 7.4 Applying the principles of retailing as they apply to retail credit by presenting a policy outline for the retail credit institution you have chosen which is justified by these principles.

MODULE 8

Introduction to Control

Upon completing the learning experiences described in the course outline for the Module on Introduction to Control you will be able to do the following:

- 8.1 Demonstrate knowledge of terminology and principles in retailing as they relate to expense control by:
 - 8.11 Describing the need for expense control.
 - 8.12 Describing the 4 major areas involving expense control in a retail institution.
 - 8.13 Defining technical terminology (i.e., direct and indirect expense, net profit plan, contribution plan, combined net profit and contribution plan, dollar and percentage-of-sales reports, production unit accuracy, natural classification of expenses, expense center concept).
- 8.2 Demonstrate knowledge of terminology and principles in retailing as they relate to control of sales transactions by:
 - 8.21 Describing the basic requirements of a good sales control or information system.
 - 8.22 Defining the two major types of sales transactions and variations on them.
 - 8.23 Describing the major methods of recording sales.
 - 8.24 Selecting from among alternative methods of handling sales transactions, the one appropriate to the needs of a given type of retail institution.
- 8.3 Applying the principles of retailing as they relate to expenses by estimating the expenses of the retail business you have chosen, documenting your estimates from resources suggested in Modules 2 and 8.
- 8.4 Applying the principles of retailing as they relate to sales transactions by selecting a method of control of sales transactions for the retail business you have chosen, which is justified by these principles.

TRADITIONAL COURSE OUTLINE S.U., SPRING SEMESTER 1975

RET 276: Principles of Merchandising

Text: Modern Retailing Management Basic Concepts and Practices, Duncan,
Phillips and Hollander. 1972.

Merchandising Arithmetic for Retail Training, National Retail
Merchants Assoc.

Jan. 14 Orientation: Review Chapter 26, Duncan
Jan. 16 Chapt. 23, Duncan, Account Control: Review Chapt. 24
Jan. 18 Continued
Jan. 21 Chapt. 1-4 NRMA, Merchandising Arithmetic
Jan. 23 Do Problems, Mdse. Arith., Chap. 1 #1, #3, #5; Chap. 2, #1, #2, #3
Jan. 25 Do Problems, Chap. 3, #1, #4, #5, #7; Chap. 4, #1, #3
Jan. 28 Review Chap. 5 NRMA, Problems 4a and 4b
Jan. 30 Continued
Feb. 1 Quiz on Profit and Loss and Inventory
Feb. 4 Speaker
Feb. 6 Chap. 13, Duncan: Mdse. Management
Feb. 8 Chap. 14, Duncan, Mdse. Management and the Budget
Feb. 11 Chap. 6, NRMA, Problems #6, #9, #10
Feb. 13 Chap. 7, NRMA, Problems #1, #2, #3, #4, #5, #6
Feb. 15 Continued
Feb. 18 Quiz
Feb. 20 Speaker
Feb. 22 Chap. 10, Duncan, Buying the Right Merchandise
March 4 Continued
March 6 Chap. 11, Duncan, Resources and Buying
March 8 Chap. 16, 17, Duncan; Pricing
March 4 March 7 - Middle of Semester
March 6 Chap. 8, NRMA
March 8 Chap. 8, NRMA, Problems #1, #2, #3, #4
March 11 Continued
March 13 Quiz
March 15 Discussion on Current Topics
Vacation March 16 - 25
March 25 Chap. 12, Duncan, Negotiations with Resources
March 27 Chap. 9, NRMA, Orders, Invoices and Vendors' Discounts
March 29 Problems 1 through 9, NRMA
Apr. 1 New York trip April 2, 3, 4
Apr. 3 at Syracuse - to be announced
Apr. 5 Report of New York trip, trends, the market, etc.
Apr. 8 Review, Terms
Apr. 10 Quiz
Apr. 12 Chap. 15, Duncan, Receiving, Operations
Apr. 15 Merchandising Special Events, i.e., Christmas, Budget Store,
promotional

Apr. 17 Merchandising Home Furnishings
Apr. 19 Branch Store Merchandising, Imports
Apr. 22 Speaker
Apr. 24 Fashion Merchandising
Apr. 26 Continue Fashion Merchandising
LAST DAY OF CLASS: PAPERS DUE

Papers should reflect reading and research on Chapter 15, and where applicable, course topics discussed April 15-24. Paper is DUE on day designated.

Bibliography required for paper as suggested in RET 275. Special attention should be given to corresponding topics in this course outline.

Grading: 20% each quiz, 40% paper.

From past experience, failure to do the problems has produced poor performance.

Help in the form of individualized instruction will be provided. Individualized instruction for those students needing review work in arithmetic will be provided.

COMPETENCY STATEMENTS DEVELOPED FOR SYRACUSE
MERCHANDISING COMPONENT

MODULE 1

Common Accounting Procedures for Retailing

Upon completing the learning experiences for this module you will be able to do the following:

Demonstrated by 15
multiple choice →
questions

Demonstrated by
computational →
problems

Application to
be demonstrated →
in project

- 1.1 Demonstrate knowledge of accounting theory by:
 - 1.11 Discussing the need for accounting control
 - 1.12 Defining terms used in profit and loss and operating statements
 - 1.13 Describing four methods of accounting control (i.e., cost, retail inventory, LIFO, merchandise management accounting)
 - 1.131 Differentiating between profit and loss and retail inventory department operating statements
 - 1.132 Listing advantages and disadvantages of each method
 - 1.14 Describing a balance sheet
- 1.2 Demonstrate your ability to apply accounting theory, given appropriate merchandise data by:
 - 1.21 Computing profit and loss statements on a whole store by the cost method.
 - 1.22 Converting all profit and loss data as percent of net sale.
 - 1.23 Computing closing inventory at cost by a. the cost method and b. the retail inventory method
 - 1.24 Computing a departmental operating statement by the retail inventory method.
- 1.3 Apply principles of accounting theory and practice to a retail business of your choice (you may use the one chosen for design last semester or a new one) from a data base of actual figures and percentages of similar businesses reported in current references in the library. (Reference Room or Reserve Desk.) Such data should be adjusted if, after analysis you feel they will become more applicable to your situation. Such adjustments must be justified on the basis of documentation. (Bibliography footnote.)

- 1.31 Choose a method of accounting theory and appropriate accounting procedures for your business.
- 1.32 Prepare a profit and loss statement for your business.
- 1.33 Prepare a department operating statement for your business.
- 1.34 Prepare a balance sheet for your business.
- 1.35 Summarize the data for your business with a brief analysis of your statements. The analysis should include reasons for your decisions and expected outcome.

MODULE 2

Merchandise Management and the Merchandise Budget

Upon completing the learning experiences for this module you will be able to do the following:

Demonstrated by 15
multiple choice
questions →

- 2.1 Demonstrate knowledge of Merchandise Management Theory by:
 - 2.11 Describing the general principles of merchandise management.
 - 2.12 Describing and giving advantages and limitations of types of merchandise information systems (i.e., \$ control, unit control).
 - 2.13 Describing the role of EDP in merchandise management
 - 2.14 Describing methods of merchandise planning i.e., stock turnover, stock-sales-ratio).
 - 2.15 Describing types of stock shortages and methods of control.
 - 2.16 Describing basic elements in merchandise budget, i.e., planned stock, sales, markdowns, shortages, purchases, gross margin.
 - 2.17 Describing the procedure for planning a merchandise budget.
 - 2.18 Describing limitations and advantages of the merchandise budget
 - 2.19 Describing patterns of responsibility for merchandise budgeting in various types of retail institutions

Demonstrated by
computational
problems →

- 2.2 Demonstrate your ability in the computation of Merchandise Budgeting tools by:
 - 2.21 Computing percent cumulative markon to original retail from given appropriate data.
 - 2.22 Computing stock turnover given appropriate data.

Application to
be demonstrated →
in project

- 2.23 Computing stock-sales ratios given appropriate data
- 2.24 Computing planned sales
- 2.25 Computing purchases at retail
- 2.26 Computing purchases at cost
- 2.27 Computing open-to-buy
- 2.28 Estimating markdowns
- 2.29 Estimating shortages

- 2.3 Apply principles of Merchandise Management Theory and practice to a retail business of your choice (you may use the one chosen for design last semester or a new one) from a data base of actual figures and percentages of similar businesses reported in current references in the library. (Reference Room or Reserve Desk.) Such data should be adjusted if, after analysis you feel they will become more applicable to your situation. Such adjustments must be justified on the basis of documentation. (Bibliography footnote.)
 - 2.31 Prepare a 6 months plan of your purchases with all necessary figures, through to cumulative markon to original retail and stock turn for your business (sample in NRMA, Merchandising Arithmetic page 30). Other suitable forms may be used as long as they contain similar information.
 - 2.32 Describe concisely for your business the method of merchandise management and justify all decisions.
 - 2.33 Compute an open-to-buy statement for your business for at least one month based on figures from your 6 month plan. (Some information may be estimated.)
 - 2.34 Summarize the data for your business with a brief analysis of your statements. The analysis should include reasons for your decisions and expected outcome.

MODULE 3

Pricing Merchandise

Upon completing the learning experiences for this module you will be able to do the following:

- 3.1 Demonstrate knowledge of pricing theories by:
 - 3.11 Describing factors affecting pricing policies
 - 3.12 Describing methods of setting initial prices specific goods

Demonstrated by
15 multiple
choice
questions

- 3.13 Describing elements included in structure of markup
- 3.14 Describing types of price change
- 3.15 Describing situations requiring price changes
- 3.2 Describe relationships of government legislation to institution pricing policies.
 - 3.21 Describing specific sections of laws affecting retail pricing
 - 3.22 Stating how specific sections of government legislation affect retail pricing

Demonstrated by →
computational
problems

- 3.3 Demonstrate your ability to do computations needed for pricing by:
 - 3.21 Computing initial markon, given appropriate merchandise data
 - 3.22 Computing cost in dollars
 - 3.24 Computing markon percent
 - 3.25 Computing unit and total markdown in dollars

Application
demonstrated
by project →

- 3.4 Apply principles of Merchandise Pricing Theory to a retail business of your choice for a data base of actual figures and percentages of similar businesses reported in current references in the library. (Reference Room or Reserve Desk.) Such data should be adjusted if, after analysis you feel they will become more applicable to your situation. Such adjustments must be justified on the basis of documentation. (Bibliography footnote.)
 - 3.41 Determining initial prices for your merchandise based on chosen method (i.e., price lines, price zones, other) and justify your decisions for your business.
 - 3.42 Determining policies for markdowns in your business
 - 3.43 Describing pricing decisions in your business affected by government legislation
 - 3.44 Summarize with a brief analysis of your statements. The analysis should include reasons for your decisions and expected outcome.

MODULE 4

Buying Merchandise

Upon completing the learning experiences for this module you will be able to do the following:

- 4.1 Demonstrate knowledge of theories of buying merchandise by:
 - 4.11 Describing methods of interpreting customer's needs

Demonstrated by
multiple choice
problems

Demonstrated by
computational
problems

- 4.12 Describing ways of determining quantities of merchandise to buy
- 4.13 Describing the types of markets to buy from (i.e., central, foreign)
- 4.14 Differentiating and explaining the various sources to buy from
- 4.15 Describing the various types of buying offices
- 4.2 Demonstrate knowledge of negotiating the purchase of merchandise by:
 - 4.21 Explaining terms of sale with and without discounts
 - 4.22 Explaining terms of sale; all types of datings
 - 4.23 Explaining other negotiations
 - 4.24 Describing all aspects of a purchase order
 - 4.25 Explaining transfer title
- 4.3 Demonstrate your ability to do computations needed for negotiations with vendors by:
 - 4.31 Computing all terms on invoices
- 4.4 Demonstrate knowledge of principles of receiving merchandise by:
 - 4.41 Explaining the functions of the receiving room
 - 4.42 Describing checking procedures
 - 4.43 Describing marking procedures
 - 4.44 Describing the distribution of merchandise after marking
 - 4.45 Describing procedures as they relate to chain stores, large stores, small stores
- 4.5 Apply principles of buying merchandise to a retail business, of your choice (you may use the one chosen for design last semester or a new one) from a data base of actual figures and percentages of similar businesses reported in current references in the library. (Reference Room or Reserve Desk) Such data should be adjusted if, after analysis you feel they will become more applicable to your situation. Such adjustments must be justified on the basis of documentation. (Bibliography footnote.)
 - 4.51 Describing the method of purchasing the merchandise for your business (i.e., fashion goods, staple goods)
 - 4.52 Choosing markets for your main sources of supply
 - 4.53 Listing your major vendors
 - 4.54 Making a decision regarding the use of a buying office

Application to +
be demonstrated
by project

- 4.55 Describing terms of sale most commonly available for your merchandise
- 4.56 Developing a sample trip buying plan for a specific trip to market appropriate to your business
- 4.57 Determining type of receiving and marking and distribution process to be used in your business
- 4.58 Summarize with a brief analysis of your statements. The analysis should include reasons for your decisions and expected outcome.

RETAILING COOPERATIVE FIELD WORK APPLICATION

Syracuse University College for Human Development

Date _____

Please clip two small photographs

Name _____ Major _____

Social Security Number _____

Graduation Date _____ Advisor _____

Field Work Coordinator _____

Present

Campus Address _____ Phone _____

Campus Address
(if changed) _____ Phone _____

Parent (or guardian's name) _____ Relationship _____

Address _____

Date of Birth _____ Place of Birth _____

Citizen _____ Height _____ Weight _____

Work Experience

<u>Firm Name and Address</u>	<u>Type of Work</u>	<u>Full or Part-time</u>	<u>Dates Employed</u>	
			<u>From</u>	<u>To</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

S.U. accumulative grade point average _____

Other colleges and universities attended and dates _____

Social sorority, if any _____

Scholarships or honors received _____

Hobbies, sports, outside interests _____

Activities in college including foreign study, if any _____

Physical limitations _____

Do you have a car on campus? _____

Additional Comments _____

GUIDELINES AND INSTRUCTIONS FOR THE COOPERATIVE FIELD WORK
STUDENT OF RETAILING: TRADITIONAL FORMAT

Do:

Prepare for the interview.
Dress for the interview and be confident.

Once you are an employee of the store, remember:

1. You are a regular employee and will receive a regular salary commensurate with your ability and the job assigned to you.
2. You represent Syracuse University and will be expected to show more interest and initiative than the average employee.
3. If work is required of you, this takes preference over other things, such as extra-curricular activities.
4. In case of illness or other emergency necessitating your absence from work, notify your employer at once.
5. Be punctual.
6. Be loyal to your employer.
7. Follow instructions.
8. Be willing to learn from others, even though they may not have had the educational opportunities you have had.
9. Your employer has been told that you are preparing for a professional career in retailing. He is going to expect more from you because of your education, training and expressed interest.
10. The Syracuse stores are working cooperatively with the University. They understand that this is an educational venture for them, an important one for the future of retailing. Although they are giving you as much responsibility as they can, the success of their business operation must be their first concern.

Some Do Nots:

1. Do not talk negatively about the store or the people in it.
2. Do not expect extra consideration.
3. Do not walk off the job. If there is a problem you cannot solve through regular store channels, contact your coordinator as soon as possible.

About Vacations:

1. Thanksgiving Vacation.
Two of the most important days of the year in retailing are Friday and Saturday after Thanksgiving. Christmas business officially starts. You will be expected to be on the job.

COOPERATIVE FIELD WORK - RETAILING

2. Christmas Vacation.
Your employer has been told you are prepared to work through December 24th.
3. We cannot expect, in a cooperative program, not to be on the job when needed. Whenever it is possible, your employer will work out personal problems but do not expect the very unusual.
4. Arrangements have been made for housing on campus if your regular accommodations are not available during the part of vacation you are in your work-study position.

Please write a brief description of your activities at the end of each working week and submit it to your coordinator on a weekly basis.

Please give your coordinator a schedule of your working hours.

You will be expected to attend Seminar on Wednesdays, 7 - 9 p.m. on a regular basis. Discussion and exchange of ideas are important to the whole concept of the Cooperative Field Work experience.

Good luck and enjoy your new experience!

TRAINEE JOB DESCRIPTION: TRADITIONAL FORMAT

The Cooperative Student should be exposed to:

FLOOR:

1. Supervision
2. Display
 - a. order signs
 - b. coordinate with merchandise
 - c. set up ads
3. Stock
 - a. Fill-ins
 - b. counts
4. Housekeeping
5. Customer Services, i.e., credit, etc.

STOCK ROOM:

1. Suburban Transfers
2. Retickets
3. Markdown
4. Claims
5. Stock Away
6. Housekeeping

INVOICING:

1. Problem File
2. Check receipts
3. Expedite Merchandise to Dept.

SUBURBAN STORES:

1. Visits
2. Information

AWARENESS OF:

1. Buying Plan
2. Merchandise Plan
3. Markup: Shrinkage

(Sit in on Salesman's Presentations)

(Market Trips)

(Visit Competing Stores

- a. For merchandise information and analysis of merchandise presentation)

Basic Stock Controls
Unit Controls
Age of Stock Sheets
Import Merchandise Control
IBM Set Up
Special Orders
Purchase Journal
Audited Sales
Order Checking
Photos
Writing & Extending Orders

--	--	--	--	--

Personal Appearance and Attitude

Speech

Manner

Manner (friendliness, aggressiveness)

Pride in Work

Sense of Responsibility

Selling

Attracting and Greeting the Customer

Determining Customer's real needs

Choosing an appropriate selection of goods

Knowledge of merchandise and knowledge of stock

Suggestion selling

Closing the sale

Ability to handle multiple problems

Ability to handle particular responsibilities

Uses time productively

Non-Selling

Job knowledge (details of job) and organization

Production (quantity)

Accuracy (quality of work)

Judgment (able to handle the situations which arise)

Cooperation (relationship to co-workers)

Initiative

Comments:

WRITING THE "CO-OP" WORK REPORT WITH BASIS FOR GRADING

Include:

1. The name and type of store where employed.
2. The dates of employment. Salary earned.
3. The name of the department in which the student worked.
4. The title of the student's position.

Topics

- *1. Description of the position held, i.e., duties, routine, qualifications, involvement with customers, other employees, etc.
2. Description of the firm, its history, the goods and services it offers, the area it serves.
3. A position or function in the store in which the student is not involved but in which he has an interest. A study of this position.
4. Discussion of business conditions national and local during the employment period. Evaluation of these conditions on current business.
- *5. An evaluation of the total cooperative experience which the student has completed. Include areas such as professional growth and related class experience.

*Comments, whether they are positive or negative, should be made in a constructive manner.

Basis for Grading Co-op Work Report

Paper: Final Paper _____
Case Study _____
Field Work _____
Research _____

- | | |
|--|-----------|
| 1. Coverage of retailing factors: | |
| inclusion of all relevant factors | 25% _____ |
| 2. Depth of analysis | 30% _____ |
| 3. Clarity of report | |
| Writing style and form: Outline method preferred,
justification for all decisions desired, complete
but concise information. | |
| Graphs or tables are applicable. | 35% _____ |
| 4. Research bibliography | |
| footnotes, where applicable | 10% _____ |

COMMENTS:

COPY OF LETTER TO STORE MANAGERS

We have passed the half way point in the cooperative work block for our retail trainees. Rather than rush toward the end, I am including for your convenience each student's evaluation forms. I hope that you will make comments, as well, so that we can continually improve our programs.

I thought it interesting to note that as of December 24, 1973, 51 students will have completed cooperative work blocks since we started four years ago. I think you will be pleased when you think back about former student trainees whom you launched into a successful career in retailing.

Looking ahead to next year, we find we will need your support more than ever. We will have to expand our program just as most of you have expanded your business. We have more retailing majors than at any time in the history of the college. Your reputation is getting around as well as ours.

The following positions have been filled by students this year - just to give you a range of possible future positions. Again trainees were able to take over, in many instances, positions left vacant during the season which allowed you time to pick and choose for replacements.

Christmas Catalogue Coordinator - working with all the buyers in the store.
Training new employees.

Assistant Buyers in Trim-A-Tree, Street Floor Accessories, China and Glassware,
Men's Furnishings.

Department Manager, Men's Store, supervising 40 employees.

Assistant Department Manager of Trim-A-Tree.

Management Trainee - working through every department and offices of a busy
Specialty Shop.

Management Trainee - learning all the operations of a Men's Store with
a major department store.

Management Trainee - learning the operations of a major R.T.W. and Designer
Area with the responsibility of one of the departments.

If it is at all possible to discuss your evaluation with the student, it would be an excellent learning experience for him.

My best wishes for a prosperous Christmas Season and my personal good wishes for a very Merry Christmas and a Happy, Healthy New Year.

Cordially yours,

COOPERATIVE FIELDWORK PROGRAM EVALUATION BY
STORE EXECUTIVES: TRADITIONAL FORMAT

Store _____
Executive in Charge _____
Were you pleased with this year's program? _____
Were you pleased with the students' abilities? _____
Can we plan on your being a cooperating store next fall term? _____
Suggestions for improving the program:

Suggestions for our curriculum planning in Retailing:

Date _____

COOPERATIVE FIELDWORK PROGRAM EVALUATION BY STORE
EXECUTIVES: COMPETENCY-BASED FORMAT*

How would you rate this year's cooperative field work for Retailing and Distributive Education students?

- | | |
|--------------|---------|
| a) excellent | c) fair |
| b) good | d) poor |

Do you have any suggestions as to how the program might be improved on the part of:

- A. Faculty Advisor:
 - a) Administration of program
 - b) Supervision of students on job
- B. Student:
 - a) Student attitudes
 - b) Student subject matter preparation
- C. Materials:
 - a) Training Plan
 - b) Evaluation materials

*Space was provided on original form for responses. Format condensed for appendix.

S.U. College for Human Development

SUPERVISOR'S INSTRUCTIONS ATTACHED TO GENERAL
TRAINEE PLAN FOR COOPERATIVE WORK
EXPERIENCE STUDENTS: COMPETENCY
BASED FORMAT

To Cooperative Student's Supervisor:

The attached copy of our training plan is to help us both keep track of the activities in which our cooperative work study students are able to participate.

The student is being asked to keep a log and summary of her activities and the frequency with which she performed them. We would ask that you initial her sheet to verify her participation in the activity described near the end of her work experience. In the case of single events or observations it may be easiest to sign at the time.

You can then check the activity on the attached sheet and when appropriate indicate whether student performance was Excellent (E), Good (G), or Fair (F). Items that involve only observation or attendance would not need to be evaluated, merely checked.

Co-op students have a seminar on campus Wednesday NIGHT 7 - 9 PM. Please do not schedule them for work that night.

Thank you,

TABLE 39

SAMPLE SHEET FROM COOPERATIVE FIELDWORK STUDENT WEEKLY LOG:
COMPETENCY BASED FORMAT

- A. Students will be able to demonstrate at least 80% of the following competencies in a manner that will be judged at least "Good" by their immediate supervisor: (Scale: Excellent, Good, Fair)

	<u>Date</u>	<u>Activity</u>	<u>Comments</u>
1. Daily work experience reflects knowledge of store's customer service program.			
2. Sell merchandise or service in point of sale, mail and/or catalog situation.			
3. Follow established procedure for returned merchandise.			
4. Operate cash register and/or drawer and deals with opening, closing and balancing procedure.			
5. Relate merchandise knowledge to needs of customer, store or department.			
6. Apply cash and charge procedures to complete sales.			
7. Apply procedures for inter-departmental or branch/parent transfers.			

APPENDIX B

ORGANIZATION AND CONTRIBUTION OF THE ADVISORY COMMITTEE
AND COUNCIL OF DISTRIBUTIVE EDUCATION TEACHERS

APPENDIX B

FORMATION AND CONTRIBUTION OF ADVISORY BOARD AND COUNCIL OF DISTRIBUTIVE EDUCATION TEACHERS

A review of current literature on competency-based instruction points up the importance of advisory boards or consortia to assist in establishing competencies needed for each individual program. CBTE programs should include "a broad base for decision making (including such groups as college/faculty, student and public school personnel)" (Houston, 1974). More importantly, New York State currently mandates such consortia for competency-based teacher training program planning. The following excerpt from a memorandum from Dr. Vincent Gazetta, of the Bureau of Teacher Certification, New York State Education Department, dated July 1, 1974, states their position:

New York State defines a competency-based program of preparation as one which provides acceptable evidence that through collaborative efforts of representatives of colleges and universities, school districts, and professional staff of school districts, there exists:

1. An analysis and statement of the roles, responsibilities, and functions of the professional positions for which persons are being prepared.
2. A readily available statement of the skills, knowledge, and attitudes expected of program graduates, stated as explicitly and objectively as possible.
3. A statement of what constitutes acceptable evidence of the attainment as well as the standards and conditions by which the evidence is gathered.
4. An instructional program which is congruent with the expected outcomes.
5. A means by which the program is monitored, evaluated, and modified in light of the evaluation.

With this mandate in mind the teacher education program director invited a group of people to serve on such an advisory board. Keeping also in mind that "all programs utilizing the work environment to provide vocational experiences need advisory committees to help provide direction and make best use of resources" (Mason and Haines, 1972), it was decided that because of the nature of the program that representatives of the business community should be included as well as public school teachers and administrators. Even though it was not mandated, it was also felt that students in the program should be included.

Exploring competency-based education, Houston says: "Input from classroom teachers could be very useful for the program because university professors with minimal classroom contact are sometimes not aware of the day-to-day problems that teachers encounter" (Houston, 1974). He also

goes on to say that this input is not enough because new developments in the systems approach demand that for maximum student learning, teachers and future teachers must be familiar with the new concepts. One of the most important reasons for student involvement is that students, being completely involved with the whole process, will understand, become used to such programs and in turn be better equipped to teach a competency-based program themselves. This is Houston's philosophy. The students sitting on the S.U. Advisory Board added this important dimension.

It was decided to invite all the teachers in the Central Region of New York State with the hypothesis that only those interested would accept and thus provide a more active board. The final makeup of the Advisory Committee is constituted as follows:

School Administrators -----	2 suburban secondary school principals
	1 city supervisor of Business Education and Distributive Education representing the Superintendent of schools
Secondary D.E. teachers -----	10 Central New York Region
Business Community -----	5 Metropolitan Syracuse, both Retail and Industrial
Students -----	5 Syracuse University student teachers
College -----	4 Syracuse University
	The project staff
	Asst. Dean of Teacher Preparation and Dean of the College for Human Development
	1 Cornell University
Ex-Officio -----	The chief of the Bureau of Distributive Education of the State of New York
Teachers Union -----	One of the secondary school teachers was designated by the Syracuse Federation of Teachers to officially represent the Union

Due to the broad-based makeup of the Advisory Board, the project staff felt the role of the Board could serve two purposes. One, to act as a consortium to help develop the distributive education teacher training program at Syracuse University and two, to serve as an advisory group for the current federal research project.

The Advisory Board held three meetings during the academic year 1974-75. The first meeting on December 12, 1974 took the form of an orientation and information session. The group was not entirely familiar with the concepts of competency-based education. After the explanation and discussion they reacted favorably. The business community particularly applauded the concept unanimously. They relate it to the business term "Management by Objectives." The role of the advisory board was clarified and co-chairpersons were elected. Miss Jane Swiderski and Mr. Salvatore Vitale, both DE teachers, were elected co-chairpersons. The project researcher acted as recorder. The meeting concluded with a short brainstorming session led by the project staff on competencies in the area of Principles of Retail Management need by DE teachers. The competencies developed by the project

staff from the S.U. "program translation" process were given to the members of the Board for evaluation. These were to be returned by mail. Agendas for all the meetings are included in Appendix B.

The second meeting was held on March 18, 1975. Further clarifications of the Board's role were made by reviewing the main points of the Gazette memo referred to earlier in this report. The members agreed to be the consortium needed for advising the S.U.D.E. program. The Board also voted to accept the Basic Beliefs of D.E. by Lucy Crawford as a guiding philosophy for the program. They also agreed to accept the Competency Based Professional Education proposal being submitted by the S.U. School of Education to the New York State Department of Education as a support document for the professional component.

Copies of the training plan for college cooperative work experience that had been used in the traditional program at S.U. were shared with the committee. They were asked to evaluate them and offer suggestions for improvement for the competency-based program. This generated much discussion and provided the research staff with many ideas to assist in planning the competencies for this part of the program to be implemented in fall semester of 1975.

The distribution of the new New York State 11th grade syllabus in DE sparked discussion of the background knowledge needed by a teacher in order to translate marketing and distribution to the secondary school student. Further discussion of this part of the program was postponed until a later meeting when competencies for the DE methods portion of the program would be on the agenda.

Competencies for the set of modules on "Principles of Merchanding" developed for the S.U. program were distributed for evaluation.

The third Advisory Board meeting was held on June 18, 1975. This agenda focused on the occupational experience of the college student. In preparation for the meeting, the staff had developed a list of all the activities participated in by at least one of the students in the previous year's program. This list was evaluated in terms of the importance of each activity by the whole group. The businessmen were then asked to check those experiences that they thought could be realistically provided in the time period of the work experience. The group then discussed alternative ways to obtain experiences deemed valuable by the group, but which employers did not think could be provided in the time frame provided by the program. The information gained from this discussion will be used in developing a new training plan and establishing the competencies for this section of the program.

All three meetings were good working meetings. The project director and chief researcher felt that the discussions had been open, frank, and that a greater mutual understanding of the needs in distributive education had occurred among all the members of the Advisory Board.

Council of Distributive Education Teachers

With only one subject matter person on the project staff, a broad group of New York State distributive education teachers was desirable as reactors to evaluate the significance of the competencies developed in the program translation method. The group on the advisory board was made up from Central New York. It was decided to invite all members of two recent S.U. summer workshops to evaluate the competencies that had been developed. One of these had specifically centered on the New York State curriculum. The letter inviting the group to participate in the project as reactors is included in Appendix, page 131.

The final group that accepted included teachers from Districts #1, 2, 3, 4, 5, 7, 9, 12, 14 and 15. New York State DE system is composed of 11 regions. Only one region, number 11 which consisted of the Hudson Valley area did not participate in this study. No one from that region had applied to attend the workshops.

Some additional teachers from summer 1975 workshops were also asked to evaluate competency lists, although they were not formally invited to be a member of the committee. The evaluation form used for teacher evaluation was patterned after that used in Sue Coate's dissertation (Coates, 1971). The results of these evaluations are reported elsewhere in this study.

ADVISORY COMMITTEE DISTRIBUTIVE EDUCATION TEACHER PREPARATION PROGRAM
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Vincent Apartments
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October 22, 1974

Dear

The College for Human Development and the School of Education at Syracuse University are currently redesigning these retailing courses in the Distributive Education program. The curriculum closely follows the proposed New York State Distributive Education 11th grade syllabus; i.e., on the grid we used during the past two summer workshops, the program follows the right hand side proposed as the new D.E. 1 curriculum.

The program being designed in the competency based mode includes Principles of Retailing, Principles of Merchandising and the Cooperative Field Work Experience.

I have appreciated your involvement in our Syracuse University workshops and hope that you will have input into this worthwhile project which, although being tailored to New York State needs, is being federally funded and will have national significance.

Dr. Margaret Charters is the principal investigator. I am project director and content person. We would both appreciate it if you would evaluate the enclosed materials. They are based on the first course, Principles of Retailing. We would like your comments concerning what we feel to be important competencies for teachers of Distributive and Marketing education. I am sorry we cannot include the Resource Handbook developed for Module II at this time. It has already proved to be a valuable tool for our students. If, following the completion of our investigation, it is published I am sure you will find it similarly useful.

It would be most helpful to us if the participants of our summer workshops acted as an advisory panel of teachers in New York State. We would like to include you in this endeavor in helping us to evaluate our materials.

We will look forward to your response.

Sincerely,

COUNCIL OF DISTRIBUTIVE EDUCATION TEACHERS

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November 21, 1974

Dear

Syracuse University is currently involved in competence-basing its teacher preparation program in Distributive Education, in order to submit the program for re-registration under the new mandates of the New York State Division of Teacher Education and Certification.

The State Department of Education advocates, and we certainly agree, that "programs to prepare public school personnel require significant and functional cooperative efforts among school districts, institutions of higher education and appropriate professional personnel of the school districts."

With this in mind we would like to invite you to help make this venture a cooperative one by joining an Advisory Committee for competence-basing the Distributive Education Teacher Preparation Program at Syracuse University.

The first meeting of this group is planned for 4 p.m., December 12th at the Faculty Club located at 401 University Place.

May we hear from you so that we can send you a guest parking permit for a necessary parking space?

We hope that you will be able to join us in this significant venture.

Sincerely yours,

RSVP 423-2325
423-2397

EXAMPLE OF COVER SHEET FOR EVALUATION OF COMPETENCIES
IN RETAILING AND MERCHANDISING BY ADVISORY COMMITTEE
AND COUNCIL DE TEACHERS

COMPETENCIES NEEDED IN COLLEGE PREPARATION IN MERCHANDISING AND
RETAILING FOR DISTRIBUTIVE EDUCATION TEACHERS

This form has been designed to gather data about YOUR PERCEPTION as a classroom distributive education teacher, of the value of the suggested competencies and criteria required to demonstrate those competencies, in the content area of Merchandising (Retailing).

We ask that you react to each of the statements as you perceive its value for future distributive education teachers.

DIRECTIONS:

Please respond to each of the following competencies and criteria by placing a check (✓) in one column only in accordance with the following:

E - ESSENTIAL

I - IMPORTANT, should be included although not required

LV - LIMITED VALUE, could be included

U - UNIMPORTANT

If additional competencies occur to you which you think are important, and not been included, please add them.

SUMMARY OF EVALUATION BY ADVISORY COMMITTEE AND COUNCIL OF DE TEACHERS
OF COMPETENCIES IN CONTENT AREA OF RETAILING (N-25)

Competencies Needed in College Level Preparation in Retailing
for Distributive Education Teachers

COMPETENCIES	NA	E	I	LV	U	COMPETENCIES	NA	E	I	LV	U
<u>Mod I--Introduction on Retailing</u>						3.3	4	11	9	1	
1.1						3.4	4	9	7	5	
1.11		17	8			3.5	5	11	7	2	
1.12		18	7			<u>Mod IV--Store Building</u>					
1.13		14	10	1		4.1					
1.14		18	7			4.11		16	8	1	
1.2						4.111		8	12	5	
1.21		8	12	3	2	4.12		13	11	1	
1.22		12	12	1		4.121		8	15	2	
1.23		4	13	8		4.13	1	9	11	4	
1.24	1	6	9	7	2	4.131		8	13	4	
1.3						4.14		10	12	3	
1.31		12	12	1		4.2					
1.32		11	14			4.21		16	8	1	
1.33		13	11	1		4.22		14	9	2	
1.34		11	13	1		4.23		13	10	2	
1.4	1	15	9			4.24		12	13		
1.5	1	6	11	7		4.25		14	9	2	
<u>Mod II--Research in Retailing</u>						4.26		10	15		
2.1		12	11	1	1	4.27		7	15	3	
2.2		12	11	2		4.3					
2.3	1	10	9	5		4.31		12	12	1	
2.4		9	12	4		4.32		10	12	2	
2.5		12	12	1		4.33		9	10	5	1
<u>Mod III--Retail Location</u>						4.34		9	14	2	
3.1						4.4	4	7	12	1	
3.11		17	8			<u>Mod V--Retail Organization</u>					
3.12		14	11			5.1					
3.13		9	9	7		5.11		12	10	3	
3.14		7	11	7		5.12		10	9	6	
3.15		11	10	4		5.13		12	12	1	
3.16	2	8	11	4		5.14	1	8	11	5	
3.2						5.15		7	16	1	1
3.21	1	9	14	1		5.16	1	6	9	8	1
3.22	1	14	9	1		5.17		9	11	4	1

COMPETENCIES	NA	E	I	LV	U	COMPETENCIES	NA	E	I	LV	U
5.2						Mod VII--Customer Services					
5.21		10	15			7.1					
5.22		9	13	3		7.11		11	12	2	
5.23		13	11	1		7.12		14	10	1	
5.24		8	15	2		7.13		8	16	1	
5.25		11	12	2		7.14		9	15	1	
5.26		9	11	5		7.15		10	10	4	1
5.27		5	13	7		7.2					
5.28		11	12	4		7.21		17	6	2	
5.3	6	8	7	4		7.211		8	10	7	
Mod VI--Sales Promotion						7.22		15	9	1	
6.1	7	10	7	1		7.23		11	12	1	
6.2						7.24		10	14	1	
6.21		11	12	2		7.25		11	13	1	
6.22		15	9	1		7.26		10	11	4	
6.23		12	11	2		7.27		7	16	2	
6.24		10	9	6		7.271		10	11	4	
6.25		12	9	4		7.272		9	12	4	
6.26		15	10			7.273		8	12	5	
6.27		15	10			7.3	2	8	13	2	
6.28	1	10	10	3	1	7.4	2	8	15		
6.281		9	10	6		Mod VIII--Introduction to Control					
6.282		11	10	4		8.1					
6.29		10	11	4		8.11		13	10	2	
6.3						8.12		11	11	3	
6.31		13	10	2		8.13		8	12	5	
6.32		13	12			8.2					
6.4						8.21		11	13	1	
6.41		10	12	3		8.22		10	14	1	
6.411		8	14	3		8.23		13	11	1	
6.42		12	9	4		8.24	1	10	13	1	
6.43		10	11	4		8.3	2	11	10	2	
6.44		4	18	3		8.4	2	10	12	1	
6.45		8	13	4							
6.46		15	10								
6.47		18	7								
6.48		16	8	1							
6.49		19	6								
6.5	4	10	11								

SUMMARY OF EVALUATION BY ADVISORY COMMITTEE AND COUNCIL OF DE TEACHERS
OF COMPETENCIES IN CONTENT AREA OF MERCHANDISING (N=23)

Competencies Needed in College Level Preparation in Merchandising
for Distributive Education Teachers

COMPETENCIES	NA	E	I	LV	U	COMPETENCIES	NA	E	I	LV	U
Common Accounting Procedures											
Mod I--For Retailing						2.27		11	11	1	
1.1						2.28		12	9	2	
1.11		14	7	2		2.29		11	10	2	
1.12		11	10	2		2.3					
1.13		11	8	3	1	2.31		8	12	3	
1.131		7	12	3	1	2.32		10	12	1	
1.132		8	9	5	1	2.33		12	9	2	
1.14		11	9	3		2.34		10	11	2	
Mod II--Merchandise Management and The Merchandise Budget						Mod III--Pricing Merchandise					
1.2						3.1					
1.21		7	12	3	1	3.11		13	9	1	
1.22		10	8	4	1	3.12		11	11	1	
1.23		9	10	2	2	3.13		10	13		
1.24		6	12	4	1	3.14		10	13		
1.3						3.15		12	11		
1.31		11	8	3	1	3.2					
1.32		11	10	1	1	3.21		7	14	2	
1.33		9	12	1	1	3.22		5	14	4	
1.34		10	11	1	1	3.3					
1.35		10	10	3		3.31		10	12	1	
Mod II--Merchandise Management and The Merchandise Budget						3.32		11	10	2	
2.1						3.33		10	11	2	
2.11		15	8			3.34	1	10	11	1	
2.12		12	11			3.35	2	9	10	2	
2.13		7	13	13	3	3.4					
2.14		14	9			3.41		11	11	1	
2.15		12	11			3.42		10	13		
2.16		14	9			3.43		7	14	2	
2.17		12	10	1		3.44		9	14		
2.18		10	11	2		Mod IV--Buying Merchandise					
2.19		4	12	6		4.1					
2.2						4.11		17	6		
2.21		12	9	2		4.12		14	9		
2.22		13	9	1		4.13		8	11	3	1
2.23		13	8	2		4.14		9	13	1	
2.24		11	11	1		4.15		10	9	4	
2.25		14	8	1							
2.26		13	9	1							

COMPETENCIES	NA	E	I	LV	U	COMPETENCIES	NA	E	I	LV	U
4.2						4.5					
4.21		13	10			4.51		10	13		
4.22		13	10			4.52		9	13	1	
4.23		10	9	4		4.53		10	12	1	
4.24		11	11	1		4.54		10	11	2	
4.25		8	13	1	1	4.55		8	15		
4.3						4.56		14	9		
4.31		1	13	9		4.57		10	13		
4.4						4.58		8	14	1	
4.41		10	12	1							
4.42		10	11	2							
4.43		10	12	1							
4.44		8	14	1							
4.45		8	12	3							

ADVISORY COMMITTEE MEETING AGENDAS

Advisory Committee Meeting Agenda Dec. 12, 1974

1. Introduction
2. Description of teacher preparation program (DE)
 - blue sheets
 - sequence sheets
 - secondary curriculum
 - grid
3. Committee significance and role
 - a) planning and advice (Gazzetta)
 - b) validity
 - suggestions for additions to committee
 - elect chairman
4. Evaluation form Retailing 275 (those who haven't completed or received)
5. Brainstorm co-op competencies
 - simulation

Advisory Committee Meeting Mar. 18, 1975

1. Discussion of a statement of the position for which persons are being prepared in the Distributive Education program.
 - a) See p. 6 in the material on Teacher Education Program Proposals following Gazzetta' memo in your packet.
 - b) Copy Lucy Crawford's basic beliefs
 - c) Copy S.U. elementary program Part A
2. Results of brainstorming on teacher competencies to be gained from co-op work experience. Compare with training plan.
3. What does a teacher need to know to translate marketing and distribution content areas into secondary distributive classroom. (Copies new D.E. syllabus available) to produce students who are effective "on the jobs."
Brainstorm.
4. Distribute "Merchandising 276" competencies for evaluation.

Distributive Education Advisory Committee June 18, 1975

1. Rank list of job activities as to whether they are Essential, Important, Limited Value or Unimportant to include in the work-experience component of training for a distributive education teacher.

This list of activities was compiled from the job descriptions of all the cooperative work experience students (26) in 1974 and includes all the suggestions made at the last advisory committee meeting.

The percentage figure included is the percentage of students that reported having done the activity described. These figures are only approximate at this time.

2. Divide into two groups: (While staff is summarizing results of ranking under 1.)

- A. Employers check another copy of the same list indicating which activities they think could be provided on jobs during 8 week co-op experience without interfering with "a day's work for a day's pay."
- B. Teachers list those activities they think students should learn for effective classroom DE teaching that are not on the present activity list.

3. Return to one group to discuss how students might get those activities the group has agreed that students should have, but which they may not actually be able to get during the co-op period.

EVALUATION OF COOPERATIVE FIELDWORK ACTIVITIES FOR SYRACUSE
PROGRAM BY ADVISORY COMMITTEE AND DE TEACHERS (N=46)

		Evaluation*					Percentage 1974 Students Participating
		NA	E	I	LV	U	
							<u>N=26</u>
A. CUSTOMER SERVICE	#1						38
1. Type training-(state type done, central or decentral)		5	22	16	2	1	12
2. Sales (floor, mail, telephone, security, irate customers, tally)	#2		36	10			100 30 15
3. Returned merchandise	#3	1	10	25	10		46
4. Gift wrap			3	16	21	6	12
5. Credit		2	24	18	2		4
B. STOCK							
1. Transfers	#7		18	17	9	2	77
2. Reticketing		1	9	26	10		35
3. Markdowns							
a) record keeping (count in book)	#8		25	17	4		73
b) changing prices on tickets			13	26	5	2	38
4. Fill-ins							
a) storage rooms	#9	1	11	24	9	1	69
b) other source		7	6	19	11	3	58
5. Counts	#10						
a) periodic		1	23	18	4		58
b) daily		3	13	22	6	2	27
c) computer		4	13	20	6	3	4
6. Putting stock away and rearranging	#11	1	16	22	6	1	77
7. Housekeeping							
a) department	#12 {		11	33	2		58
b) stockroom	{	2	8	30	6		23
C. RECEIVING							
1. Problem-file invoices			12	26	6	2	
2. Check receipts of merchandise	#17		17	24	5		30

*NA = No answer; E = Essential; I = Important; LV = Limited Value;
U = Unimportant

		Evaluation*					Percentage 1974 Students Participating
		NA	E	I	LV	U	
3.	Expedite merchandise to department or stockroom #18		12	28	6		27
D.	DISPLAY						
1.	Requisition of signs (fill out form)		5	20	20	1	27
2.	Write copy for signs		12	26	8		15
3.	Coordinate signs and merchandise		16	24	6		30
4.	Point of sale display						
	a) sale merchandise (arrange) } #14		24	21	1		46
	b) decorative display (i.e. mannequin counter) }		19	19	8		23
5.	Coordinate merchandise with ad/catalog	1	9	31	5		23
E.	ADVERTISING						
1.	Select merchandise for ads	23	18	4	1		
2.	Take requisition and merchandise to ad	5	20	16	5		4
3.	Check copy and sign for release that copy/sketch is correct	7	27	9	3		
F.	SUPERVISION #22						
1.	Knowledge merchandise #5	3	34	9			54
2.	No. of people						
	a) full-time	3	10	23	8	2	27
	b) part-time	6	9	22	9	0	23
3.	Scheduling						
	a) full responsibility (full decision-making)	2	14	26	4	0	38
	b) part responsibility						
	-requesting additional personnel						
	-signing time card						
	-other #15	2	8	30	6	0	23
4.	Training new or seasonal personnel on the floor:						
	a) cash register	1	19	25	1		23
	b) sales	3	17	26			

*NA = No answer; E = Essential; I = Important; LV = Limited Value;
U = Unimportant

	Evaluation*					Percentage 1974 Students Participating
	NA	E	I	LV	U	
c) merchandise knowledge	3	18	25			
d) stock keeping	3	13	17	3		
5. Cash register responsibility (number of registers beyond own register) #4 Competency related to own register	1	10	19	6		42
6. Merchandise information for salespeople -(i.e. catalogs, ads, sales, etc., copies of tear sheets in department) #16	1	14	27	4		12
7. Supplies - ordering	1	11	19	5		30
8. Customer service (beyond own customers)	1	15	20	10		27
9. Security #13 Competency included own area	1	19	19	7		27
10. Set sales quotas	1	7	25	12	1	4
11. Authorization	1	4	24	6	1	19
	Observation*					Percentage 1974 Students Participating
	NA	E	I	LV	U	
G. CONTROL-RECORD KEEPING #19 (minimum 2 activities)						
1. Basic stock control	1	23	22			15
2. Unit Control	1	19	24	1		4
3. Age of stock sheets		7	29	10		
4. Import merchandise control	2	10	21	11	2	
5. Computer setup		10	27	6	3	4
6. Special orders	1	7	27	11		19
7. Purchase journal	2	10	23	8	3	8
8. Audited sales	1	5	33	4	3	4
9. On-order file	1	7	29	8	1	
10. Writing and extending orders	1	11	20	14		8

*NA = No answer; E = Essential; I = Important; LV = Limited Value;
U = Unimportant

	Observation*					Percentage 1974 Students Participating †
	NA	E	I	LB	U	
11. Other operational activities (i.e. restaurant)	4	4	22	12	4	
12. Sales figures, commissions	1	17	24	4		15
H. MERCHANDISING PROCESSES #20 (minimum 2 activities)						
1. Buying plan	1	29	15	1		12
2. Merchandise plan	1		29	16		4
3. Other merchandising decisions (i.e. pricing, buying and markdown)	2	33	10	1		4
4. Shortage	2	20	21	3		
5. Vendors' presentation	1	14	27	4		8
6. Market trips	2	17	25	2		
7. Visit suburban or parent stores	1	17	21	5	2	12
8. Visit distribution center	2	21	22	1		
9. Store meetings (i.e. advertising, buyers, etc.)		18	26	1	1	8
I. SPECIAL ASSIGNMENTS #24						
1. Comparative shopping		11	32	3		8
2. Shopping employees	1	6	34	5		4
3. Special events (i.e. pep nite, fashion show, etc.)	1	10	34	1		23
4. Annual inventory (D.E.)	1	22	22	1		
	Implementation*					Percentage 1974 Students Participating †
	NA	E	I	LV	U	
G. CONTROL-RECORD KEEPING #19 (minimum 2 activities)						
1. Basic stock control	9	16	18	3		15
2. Unit Control	9	14	17	6		4

*NA = No answer; E = Essential; I = Important; LV = Limited Value;
U = Unimportant

† Percentages combine observation and/or implementation.

	Implementation*					Percentage 1974 Students Participating†
	NA	E	I	LV	U	
3. Age of stock sheets	12	2	18	13	1	
4. Import merchandise control	12	3	16	11	4	
5. Computer setup	11	4	19	10	2	4
6. Special orders	9	4	22	9	2	19
7. Purchase journal	12	5	26	10	3	8
8. Audited sales	11	3	22	7	3	4
9. On-order file	9	5	18	12	2	
10. Writing and extending orders	9	11	19	7		8
11. Other operational activities (i.e. restaurant)	13	3	13	13	4	
12. Sales figures, commissions	11	10	19	6		15
H. MERCHANDISING PROCESSES #20 (minimum 2 activities)						
1. Buying plan	9	19	14	4		12
2. Merchandise plan	9	18	15	4		4
3. Other merchandising decisions (i.e. pricing, buying and markdown)	10	18	16	2		4
4. Shortage	12	10	17	7		
5. Vendors' presentation	11	7	22	5	1	8
6. Market trips	10	16	17	2	1	
7. Visit suburban or parent stores	11	13	19	2	1	12
8. Visit distribution center	10	17	18	1		
9. Store meetings (i.e. advertising, buyers, etc.)	11	13	20	2		8
I. SPECIAL ASSIGNMENTS #24						
1. Comparative shopping	9	7	25	5		8
2. Shopping employees	10	3	23	8	2	4
3. Special events (i.e. pep nite, fashion show, etc.)	9	7	24	6		23
4. Annual inventory (D.E.)	8	22	14	2		

*NA = No answer; E = Essential; I = Important; LV = Limited Value;

U = Unimportant

† Percentages combine observation and/or implementation.

APPENDIX C

STUDENT EVALUATIONS OF COMPETENCY BASED RETAILING AND
MERCHANDISING COMPONENTS

COVER SHEET AND INSTRUCTIONS FOR
STUDENT EVALUATION FORMS OF S.U.
PROGRAM COMPONENTS

This questionnaire is designed to assist your instructor and the Center for Instructional Development in evaluating the instructional unit you have just completed. Please be frank since your comments will play a role in helping us reach the quality academic program we are hoping to establish.

DIRECTIONS

1. Please respond in pencil on a machine-scorable answer sheet.
2. Turn your answer sheet to a horizontal position and fill in your name, course, instructor, and date.
3. Fill in the boxes on the right with your name and blacken the corresponding slots.
4. Print your complete social security number in the box labeled STUDENT NUMBER and blacken the corresponding slots.

!! IMPORTANT !!

Information collected on this instrument will be preserved as a professional confidence by the Center for Instructional Development. None of your responses will be reported by name to your instructor.

5. In Column One of the box labeled ADDITIONAL CODED DATA, write the number of the unit you have just completed and blacken the corresponding slot. This number will be given to you by your instructor.

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FORM FOR STUDENT EVALUATION (OMNIQUEST) OF
SYRACUSE COMPETENCY-BASED RETAILING COMPONENT

On your answer sheet please blacken the letter which corresponds to the response that most nearly agrees with your own.

1. All things considered, this course was:

- | | |
|--------------|---------|
| a) excellent | c) fair |
| b) good | d) poor |

2. How would you describe the student directions for this course? (if applicable)

- a) very clear and comprehensive
- b) fairly clear but missing important elements
- c) generally confusing and inadequate
- d) a waste of time

2a. On the back of your answer sheet, please list the specific ways in which the directions could be improved.

3. Generally, how would you describe the work load required by this course?

- | | |
|-------------------|-----------------|
| a) very excessive | c) just right |
| b) heavy | d) rather light |

3a. If you answered "a" or "b" please describe in greater detail on the back of your sheet.

4. How effective were the lecture groups in this course? (if applicable)

- | | |
|-------------------------|------------------------|
| a) extremely effective | c) minimally effective |
| b) moderately effective | d) a waste of time |

5. Overall, how would you rate the interest level of the class meetings in this course? (if applicable)

- | | |
|--------------------------|----------------|
| a) extremely interesting | c) dull |
| b) interesting | d) really dull |

6. Overall, how would you describe the readings in this course? (if applicable)

- | | |
|--------------------|--------------------|
| a) very beneficial | c) confusing |
| b) adequate | d) a waste of time |

7. Overall, how would you describe the retail research module assignment in this course?
- a) very beneficial
 - b) adequate
 - c) confusing
 - d) a waste of time
8. How would you describe the paper(s)/project you had to do for this course? (if applicable)
- a) highly rewarding
 - b) difficult but worth the effort
 - c) too hard and too confusing
 - d) a real waste of my time
9. Would you prefer to have project as one assignment at the end of the course?
- a) yes
 - b) no
10. Rate the fairness of the tests, if any, that were used in this course.
- a) very fair; well matched with what was taught
 - b) fair; generally but not always matched what was taught
 - c) somewhat unfair; frequently tested things I didn't think were taught or required
 - d) very unfair; tests had little or no relevance to what was taught
11. Rate the fairness of the grading procedures (the assignment of letter grades) that were used in this unit. (if applicable)
- a) excellent
 - b) good
 - c) fair
 - d) poor
12. Materials for this course were available when I needed them.
- a) always
 - b) usually
 - c) rarely
 - d) never
13. Was this course an enjoyable experience for you?
- a) always
 - b) frequently
 - c) occasionally
 - d) never
14. On the whole, how much do you think you learned?
- a) a great deal
 - b) some
 - c) not very much
 - d) nothing

Items 15-28, please rate only those instructional materials that were used in this course. Omit all items that do not apply.

15. Required text(s)

- | | |
|--------------|---------|
| a) excellent | c) fair |
| b) good | d) poor |

16. Resource materials

- | | |
|--------------|---------|
| a) excellent | c) fair |
| b) good | d) poor |

17. How would you describe the Research Module booklet?

- | | |
|--|---------------------------------------|
| a) very clear and comprehensive | c) generally confusing and inadequate |
| b) fairly clear but missing important elements | d) a waste of time |

18. Rate the adequacy of your opportunity to meet directly with the principal instructor.

- | | |
|--------------|---------|
| a) excellent | c) fair |
| b) good | d) poor |

19. Rate the adequacy of your opportunity to meet directly with the teaching assistant(s).

- | | |
|--------------|---------|
| a) excellent | c) fair |
| b) good | d) poor |

20. If they were available, would you take more courses designed this way?

- a) yes
b) no

21. Was it an advantage to take quiz on text and lecture before doing each section of project?

- a) yes
b) no

21a. On the back of the answer sheet please list the specific ways in which the course format could be improved.

22. Are there any topics or materials, not included in this course that you would like to have covered?

23. Rank the following in order of their usefulness to you in doing research for project.

- ☐ a) librarian lecture
- ☐ b) library tour
- ☐ c) selected Retail Resources handbook

24. If I were planning the Research Module for another term I would include:

- ☐ classroom lecture
- ☐ librarian lecture
- ☐ library tour
- ☐ selected Resource handbook

because _____

25. Are there any parts of the course you would prefer to learn from reading only, or using programmed booklets? Be specific _____

26. The most valuable thing about the course was _____

because _____

27. The least valuable thing about the course was _____

because _____

28. Overall the "Selected Resources for Retail Research" booklet was _____

because _____

SUMMARY OF STUDENT EVALUATIONS OF SYRACUSE UNIVERSITY
COMPETENCY-BASED RETAILING 275 - FALL 1974

Item No.	Percentage Choice Distributions by Total of Respondents (N = 58)					Means and Sigma Based Maximun Number of Cases for each Item		
	Omits	1	2	3	4	No. Cases	Mean	Sigma
1	0	9	67	21	3	58	2.19	.629
2	2	17	45	36	0	57	2.19	.712
3	0	14	62	24	0	58	2.10	.607
4	7	5	64	22	2	54	2.22	.567
5	0	5	57	38	0	58	2.33	.569
6	0	48	50	2	0	58	1.53	.532
7	0	40	31	26	3	58	1.93	.888
8	3	17	62	17	0	56	2.00	.598
9	3	19	78	0	0	57	1.86	.575
10	0	38	48	12	2	58	1.78	.720
11	2	40	48	9	2	57	1.72	.695
12	0	10	72	17	0	58	2.07	.521
13	2	16	52	31	0	57	2.16	.670
14	0	50	45	5	0	58	1.55	.592
15	0	28	59	12	2	58	1.88	.672
16	3	28	48	19	2	56	1.95	.742
17	2	41	40	16	2	57	1.77	.773
18	2	29	33	26	10	57	2.18	.976
19	10	29	48	12	0	52	1.81	.652
20	3	69	28	0	0	56	1.29	.452
21	9	67	24	0	0	53	1.26	.441

FORM FOR STUDENT EVALUATION (OMNIQUEST) OF
SYRACUSE COMPETENCY-BASED MERCHANDISING COMPONENT

On your answer sheet please blacken the letter which corresponds to the response that most nearly agrees with your own.

1. All things considered, this course was:
 - a) excellent
 - b) good
 - c) fair
 - d) poor
2. How would you describe the student directions for this course? (if applicable)
 - a) very clear and comprehensive
 - b) fairly clear but missing important elements
 - c) generally confusing and inadequate
 - d) a waste of time
- 2a. On the back of your answer sheet, please list the specific ways in which the directions could be improved.
3. Generally, how would you describe the work load required for this course?
 - a) very excessive
 - b) heavy
 - c) just right
 - d) rather light
- 3a. If you answered "a" or "b" please describe in greater detail on the back of your sheet.
4. How effective were the lecture groups in this course? (if applicable)
 - a) extremely effective
 - b) moderately effective
 - c) minimally effective
 - d) a waste of time
5. Overall, how would you rate the interest level of the class meetings in this course? (if applicable)
 - a) extremely interesting
 - b) interesting
 - c) dull
 - d) really dull
6. Overall, how would you describe the text "Duncan" in this course?
 - a) very beneficial
 - b) adequate
 - c) confusing
 - d) a waste of time

7. Overall, how would you describe the text NRMA Merchandising Arithmetic for Retail Training in this course?
- a) very beneficial
 - b) adequate
 - c) confusing
 - d) a waste of time
8. How would you describe the paper(s)/project you had to do for this course? (if applicable)
- a) highly rewarding
 - b) difficult but worth the effort
 - c) too hard and too confusing
 - d) a real waste of my time
9. Would you prefer to have project as one assignment at the end of the course?
- a) yes
 - b) no
10. Rate the fairness of the tests, if any, that were used in this course.
- a) very fair; well matched with what was taught or required.
 - b) fair; generally but not always matched what was taught or required.
 - c) somewhat unfair; frequently tested things I didn't think were taught or required
 - d) very unfair; tests had little or no relevance to what was taught or required.
11. Rate the fairness of the grading procedures (the assignment of letter grades) that were used in this unit. (if applicable)
- a) excellent
 - b) poor
 - c) fair
 - d) poor
12. Materials for this course were available when I needed them.
- a) always
 - b) usually
 - c) rarely
 - d) never
13. Was this course an enjoyable experience for you?
- a) always
 - b) frequently
 - c) occasionally
 - d) never
14. On the whole, how much do you think you learned?
- a) a great deal
 - b) some
 - c) not very much
 - d) nothing

15. Rate the clarity of the stated competencies.

- a) excellent
- b) good

- c) fair
- d) poor

16a. On the whole, how much benefit were the make up tests?

- a) a great deal
- b) some

- c) not very much
- d) none

16b. On the back of your answer sheet, please explain your answer in detail.

17. How would you describe the Merchandise Math at Independent Learning Lab?

- a) very clear and comprehensive
- b) fairly clear but missing important elements

- c) generally confusing and inadequate
- d) a waste of time
- e) did not use

18. Rate the adequacy of your opportunity to meet directly with the principal instructor.

- a) excellent
- b) good

- c) fair
- d) poor

19. Rate the adequacy of your opportunity to meet directly with the teaching assistant(s).

- a) excellent
- b) good

- c) fair
- d) poor

20. If they were available, would you take more courses designed this way?

- a) yes
- b) no

21. Was it an advantage to take quiz on theory and computation before doing each section of term paper?

- a) yes
- b) no

21a. On the back of the answer sheet please list the specific ways in which the course format could be improved.

22. Are there any topics or materials, not included in this course that you would like to have covered?

23. Are there any parts of the course you would prefer to learn from reading only, or using programmed booklets? Be specific _____

24. The most valuable thing about the course was _____

because _____

25. The least valuable thing about the course was _____

because _____

Summary of Student Evaluations of Syracuse University
Competency-Based Merchandising 276

Item No.	Percentage Choice Distributions by Total of Respondents (N=59)						Means and Sigma Based Maximum Number of Cases for Each Item		
	Omits	1	2	3	4	5	No. Cases	Mean	Sigma
1	0	12	73	14	0	0	49	2.02	.515
2	2	41	45	12	0	0	48	1.71	.676
3	0	8	57	35	0	0	49	2.27	.598
4	0	10	61	29	0	0	49	2.18	.595
5	0	2	67	31	0	0	49	2.29	.495
6	0	45	47	4	4	0	49	1.67	.739
7	0	67	24	8	0	0	49	1.41	.636
8	2	6	53	37	2	0	48	2.35	.629
9	0	24	71	2	2	0	49	1.82	.560
10	0	78	20	2	0	0	49	1.24	.475
11	0	47	45	8	0	0	49	1.61	.633
12	2	2	45	51	2	0	48	1.56	.536
13	0	14	57	29	0	0	49	2.14	.639
14	0	71	29	0	0	0	49	1.29	.452
15	4	29	53	10	4	0	47	1.89	.750
16	0	78	18	2	2		49	1.29	.606
17	6	55	16	4	0	18	46	2.04	1.546
18	6	14	53	22	4	0	46	2.17	.731
19	4	35	51	10	0	0	47	1.74	.635
20	6	78	16	0	0	0	46	1.17	.379
21	6	80	12	2	0	0	46	1.17	.433

FORM FOR STUDENT EVALUATION OF MERCHANDISE MATHEMATICS
PROGRAMMED BOOKLETS

The following questions relate to your method of use of the programmed booklets for:

1A. Booklet I "Profit and Loss Statements."

- a) used in addition to class
- b) used and did not attend class regularly
- c) used for review only
- d) did not use

1B. Generally, this booklet was -excellent-good-fair-poor (circle choice)

2A. Booklet II - "Inventory Calculations"

- a) used in addition to class
- b) used and did not attend class regularly
- c) used for review only
- d) did not use

2B. Generally, this booklet was excellent-good-fair-poor (circle choice)

3A. Booklet III - "Buying Plans"

- a) used in addition to class
- b) used and did not attend class regularly
- c) used for review only
- d) did not use

3B. Generally, this booklet was -excellent-good-fair-poor (circle choice)

4A. Booklet IV - "Pricing and Terms Sale"

- a) used in addition to class
- b) used and did not attend class regularly
- c) used for review only
- d) did not use

4B. Generally, this booklet was -excellent-good-fair-poor (circle choice)

5. Estimate the amount of time spent on:

- a) Booklet I "Profit and Loss" _____
- b) Booklet II "Inventory" _____
- c) Booklet III "Buying Plans" _____
- d) Booklet IV "Pricing" _____

STUDENT EVALUATION FORM (OMNIQUEST) FOR COOPERATIVE
FIELDWORK EXPERIENCE: COMPETENCY BASED

On your answer sheet please blacken the letter which corresponds to the response that most nearly agrees with your own.

1. All things considered, the co-op work experience was:
 - a) excellent
 - b) good
 - c) fair
 - d) poor
2. How would you describe the competency statements for this course?
 - a) very clear and comprehensive
 - b) fairly clear but missing important elements
 - c) generally confusing and inadequate
 - d) a waste of time
- 2a. On the back of your answer sheet, please list the specific ways in which the competency statements could be improved.
3. Generally, how would you describe the work load required by this co-op experience?
 - a) very excessive
 - b) heavy
 - c) just right
 - d) rather light
- 3a. If you answered "a" or "b" please describe in greater detail on the back of your sheet.
4. How effective were the Wednesday night meetings in this course?
 - a) extremely effective
 - b) moderately effective
 - c) minimally effective
 - d) a waste of time
5. Overall, how would you rate the interest level of the Wednesday night meetings in this course?
 - a) extremely interesting
 - b) interesting
 - c) dull
 - d) really dull
6. How would you describe the paper you had to do to complete for your co-op experience?
 - a) highly rewarding
 - b) difficult but worth the effort
 - c) too hard and too confusing
 - d) a real waste of my time
7. Rate the fairness of the evaluation procedures that were used for the co-op work experience.
 - a) excellent
 - b) good
 - c) fair
 - d) poor

8. Was the co-op an enjoyable experience for you?
 - a) always
 - b) frequently
 - c) occasionally
 - d) never
9. On the whole, how much do you think you learned?
 - a) a great deal
 - b) some
 - c) not very much
 - d) nothing
10. How would you rate the self-evaluation of your work experience, human relations and communication skills in relation to your personal and professional self-growth?
 - a) excellent
 - b) good
 - c) fair
 - d) poor
11. Rate the adequacy of your opportunity to meet directly with your store supervisor.
 - a) excellent
 - b) good
 - c) fair
 - d) poor
12. Rate the adequacy of your opportunity to meet directly with the principal instructor.
 - a) excellent
 - b) good
 - c) fair
 - d) poor
13. On the back of the answer sheet please list the specific ways in which the course format could be improved.

14. The most valuable thing about the experience was _____
because _____

15. The least valuable thing about the experience was _____
because _____

Summary of Student Evaluations (OMNIQUEST) of Syracuse University
Competency-Based Cooperative Fieldwork Experience

Item No.	Percentage Choice Distributions by Total of Respondents (N=16)					Means and Sigma Based on Maximum Number of Cases for Each Item		
	Omits	1	2	3	4	No. Cases	Mean	Sigma
1	0	62	37	0	0	16	1.37	.484
2	0	75	25	0	0	16	1.25	.433
3	0	0	6	75	19	16	3.12	.484
4	0	0	50	37	12	16	2.62	.696
5	0	12	44	44	0	16	2.31	.682
6	0	25	62	0	12	16	2.00	.866
7	0	31	62	6	0	16	1.75	.559
8	0	62	31	6	0	16	1.44	.609
9	0	87	12	0	0	16	1.12	.331
10	0	50	44	6	0	16	1.56	.609
11	0	50	50	0	0	16	1.50	.500
12	0	75	19	6	0	16	1.31	.583

Student Questionnaire Form for Syracuse Traditional
Component 1975 Instructor II

On your answer sheet please blacken the letter which corresponds to the response that most nearly agrees with your own.

1. All things considered, this course was:
a) excellent
b) good
c) fair
d) poor
2. Generally, how would you describe the work load required by this course?
a) very excessive
b) heavy
c) just right
d) rather light
- 2a. If you answered "a" or "b" please describe in greater detail on the back of your sheet.
3. How effective were the lecture groups in this course?
a) extremely effective
b) moderately effective
c) minimally effective
d) a waste of time
4. Overall, how would you rate the interest level of the class meetings in this course?
a) extremely interesting
b) interesting
c) dull
d) really dull
5. Overall, how would you describe the readings in this course?
a) very beneficial
b) adequate
c) confusing
d) a waste of time
6. How would you describe the paper(s)/project you had to do for this course?
a) highly rewarding
b) difficult but worth the effort
c) too hard and too confusing
d) a real waste of my time
7. Rate the fairness of the tests, if any, that were used in this course.
a) very fair; well matched with what was taught
b) fair; generally but not always matched what was taught
c) somewhat unfair; frequently tested things I didn't think were taught or required.
d) very unfair; tests had little of no relevance to what was taught

8. Rate the fairness of the grading procedures (the assignment of letter grades) that were used in this unit.

- a) excellent
- b) good

- c) fair
- d) poor

9. Materials for this course were available when I needed them.

- a) always
- b) usually

- c) rarely
- d) never

10. Was this course an enjoyable experience for you?

- a) always
- b) frequently

- c) occasionally
- d) never

11. On the whole, how much do you think you learned?

- a) a great deal
- b) some

- c) not very much
- d) nothing

Items 15-28, please rate only those instructional materials that were used in this course. Omit all items that do not apply.

12. Required text(s)

- a) excellent
- b) good

- c) fair
- d) poor

13. Resource materials

- a) excellent
- b) good

- c) fair
- d) poor

14. Rate the adequacy of your opportunity to meet directly with the principal instructor.

- a) excellent
- b) good

- c) fair
- d) poor

15. Are there any topics or materials, not included in this course that you would like to have covered?

Summary of Student Evaluations of Syracuse University Traditional
Retailing 275, Fall 1975 (N=56)

Item No.	Percentage Choice Distributions by Total Respondents (N=56)					Means and Sigma Based on Maximum Number of Cases for Each Item		
	Omits	1	2	3	4	No. Cases	Mean	Sigma
1	0	9	64	27	0	56	2.18	.570
2	0	0	23	77	0	56	2.77	.422
3	0	25	61	14	0	56	1.89	.618
4	0	4	66	29	2*	56	2.29	.558
5	0	36	61	2	2*	56	1.70	.595
6	0	20	61	16	4*	56	2.04	.706
7	0	11	41	41	7	56	2.45	.777
8	0	12	48	37	2	56	2.29	.700
9	0	45	55	0	0	56	1.55	.497
10	0	18	36	46	0	56	2.29	.749
11	2	59	34	5	0	55	1.45	.598
12	0	14	75	11	0	56	1.96	.499
13	2	20	61	14	4	55	2.02	.700
14	2	41	34	16	7	55	1.89	.928

*Adds to 101%

STUDENT QUESTIONNAIRE FORM FOR TRADITIONAL MERCHANDISING
COMPONENT: BARUCH COLLEGE CUNY

On your answer sheet please blacken the letter which corresponds to the response that most nearly agrees with your own.

1. All things considered, this course was:

- | | |
|--------------|---------|
| a) excellent | c) fair |
| b) good | d) poor |

2. Generally, how would you describe the work load required by this course?

- | | |
|-------------------|-----------------|
| a) very excessive | c) just right |
| b) heavy | d) rather light |

2a. If you answered "a" or "b" please describe in greater detail on the back of your sheet.

3. How effective were the lecture groups in this course?
(if applicable)

- | | |
|-------------------------|------------------------|
| a) extremely effective | c) minimally effective |
| b) moderately effective | d) a waste of time |

4. Overall, how would you rate the interest level of the class meetings in this course?

- | | |
|--------------------------|----------------|
| a) extremely interesting | c) dull |
| b) interesting | d) really dull |

5. Overall, how would you describe the text in this course?

- | | |
|--------------------|--------------------|
| a) very beneficial | c) confusing |
| b) adequate | d) a waste of time |

6. Rate the fairness of the tests, if any, that were used in this course.

- | |
|--|
| a) very fair; well matched with what was taught or required. |
| b) fair; generally but not always matched what was taught or required. |
| c) somewhat unfair; frequently tested things I didn't think were taught or required. |

7. Rate the fairness of the grading procedures (the assignment of letter grades) that were used in this unit.

- | | |
|--------------|---------|
| a) excellent | c) fair |
| b) good | d) poor |

8. Materials for this course were available when I needed them.

- | | |
|------------|-----------|
| a) always | c) rarely |
| b) usually | d) never |

9. Was this course an enjoyable experience for you?

- a) always
- b) frequently

- c) occasionally
- d) never

10. On the whole, how much do you think you learned?

- a) a great deal
- b) some

- c) not very much
- d) nothing

11. Rate the adequacy of your opportunity to meet directly with the principal instructor.

- a) excellent
- b) good

- c) fair
- d) poor

12. Are there any topics or materials, not included in this course that you would like to have covered?

13. The most valuable thing about the course was _____

because _____

14. The least valuable thing about the course was _____

Summary of Student Evaluation of Baruch Traditional
Merchandising Component Instructor I

Item No.	Percentage Choice Distributions by Total of Respondents (N=11)						Means and Sigma Based on Maximum Number of Cases for Each Item		
	Omits	1	2	3	4	5	No. Cases	Mean	Sigma
1	0	18	18	45	18	0	11	2.64	.979
2	0	0	9	45	45	0	11	3.36	.643
3	27	9	36	18	9	0	8	2.37	.857
4	0	9	36	45	9	0	11	2.55	.782
5	0	0	36	18	45	0	11	3.09	.900
6	0	18	36	36	9	0	11	2.36	.881
7	9	0	45	36	9	0	10	2.60	.663
8	18	18	45	18	0	0	9	2.00	.667
9	0	9	18	45	27	0	11	2.91	.900
10	0	27	36	18	18	0	11	2.27	1.052
11	18	18	45	18	0	0	9	2.00	.667

Summary of Student Evaluation of Baruch Traditional
Merchandising Component Instructor II

Item No.	Percentage Choice Distributions by Total of Respondents (N=14)						Means and Sigma Based on Maximum Number of Cases for Each Item		
	Omits	1	2	3	4	5	No. Cases	Mean	Sigma
1	0	14	71	14	0	0	14	2.00	.535
2	0	0	14	86	0	0	14	2.86	.350
3	7	29	57	7	0	0	13	1.77	.576
4	7	21	64	7	0	0	13	1.85	.533
5	0	0	29	21	50	0	14	3.21	.860
6	0	21	43	29	7	0	14	2.21	.860
7	0	21	57	21	0	0	14	2.00	.655
8	0	43	50	0	7	0	14	1.71	.795
9	0	21	50	29	0	0	14	2.07	.703
10	0	36	57	7	0	0	14	1.71	.589
11	0	64	36	0	0	0	14	1.36	.479

APPENDIX D

INDEPENDENT STUDY MATERIALS

QUESTIONS FOR TYPICAL ASSIGNMENT IN RESEARCH
MODULE 11 IN RETAILING COMPONENT

Find answers to the following questions through library research using your resource "Selected Resources for Retail Research." Each student has a different set of questions.

1. What is the Buying Power Index of Burlington, Vt.?
2. What was the number of husband-wife families when the head of the family is under 25 in the Syracuse SMSA in 1970?
3. What was the total number of department stores in the United States in 1967?
4. What were the total sales for multi-unit organizations for variety stores in the United States in 1972?
5. What was the number of reporting units in Syracuse for building materials and farm equipment in 1972?
6. In the CURRENT BUSINESS REPORTS IN RETAILING for May 1974, what were the department store sales (seasonally non-adjusted) in May for the city of Syracuse?
7. What is the Standard Industrial Classification Code (SIC) for the Associated Dry Goods Corp. in Rochester, N. Y.?
8. Cash discount as % cost of purchase for sewing notions in department store sales \$10-50 million.
9. E & P's estimate of retail sales apparel in Champaign, Ill.
10. There are how many fewer retail outlets than a year ago?

COPY OF DIAGNOSTIC MATH TEST FOR
MERCHANDISING COMPONENT

1.
$$\begin{array}{r} 19.09 \\ \times 9.18 \\ \hline \end{array}$$
2.
$$\begin{array}{r} 1.74 \\ \times 94 \\ \hline \end{array}$$
3.
$$\begin{array}{r} 3.2 \overline{) 416} \end{array}$$
4.
$$\begin{array}{r} .41 \overline{) 49.2} \end{array}$$
5.
$$\begin{array}{r} 21.7 \overline{) 8680} \end{array}$$
6. 3% of 357 is?
7. \$15 is what percent of \$75?
8. \$1250 is 25% of what amount?
9. \$53.50 is what percent of \$107?
10. 226 is what percent of 904?

SAMPLE PAGE FROM MERCHANDISING MATHEMATICS
PROGRAMMED BOOKLETS*

Your solution should look like this:

opening inventory (Jan. 1)	\$10,000
January purchases	<u>15,000</u>
total merchandise handled (Jan.)	25,000
 LESS January sales	 12,000
Jan. markdowns	1,000
Discounts Granted	<u>500</u>
Total deductions	13,500
Closing Book Inventory (Jan. 31)	11,500
 opening inventory (Feb. 1)	 11,500

\$11,500 is the closing book inventory as of Jan. 31st. Thus we have found the closing inventory at retail without taking a physical inventory. Note: Jan. 31 closing inventory becomes Feb. 1 opening inventory.

*Mary C. Good, Principles of Merchandising Unit 2, Inventory Calculations, A Programmed Text, College of Human Development, Syracuse University, 1974 (unpublished).

REQUIRED ASSIGNMENT FOR INDEPENDENT STUDY, MODULE I
COMPUTATION, MERCHANDISING COMPONENT

1. Work through programmed booklets one and two located in HBC.
2. Read Chapter 23 in Duncan.
3. Read Chapters 1 - 5 in NRMA.
4. Attend advanced discussion sessions on Thursday.
5. NRMA problems

<u>CHAPTER</u>	<u>PROBLEMS</u>
1	2 - 6
2	2, 3, 5 - 7
3	1, 4 - 7
4	1, 3, 5, 7
5	4

Answer Key for NRMA Problems

CHAPTER I

Problem 2:	Net Profit.....	\$ 4,500
Problem 3:	Net Profit.....	\$ 8,600
Problem 4:	Net Profit.....\$12,000.....	5%
Problem 5:	Net Profit.....\$ 1,300.....	2%
Problem 6:	Net Profit.....	\$52,500

CHAPTER II

Problem 2:	\$4,401,320.20 Total Operating Expense	
Problem 3:	14,166,730 Gross cost of merchandise sold	
Problem 5:	Gross Margin.....	\$5,462,761
		36.2%
	Net Profit.....	709,254
		4.7%
Problem 6:	307,240 Gross Purchases	
	12,600 Inward Freight	
	384,200 Total Merchandise Handled	
	317,700 Gross Cost of Merchandise Sold	
	307,500 Net Cost of Merchandise Sold	
	311,900 Total Merchandise Cost of Sales	
Problem 7:	61.2 Net Cost of Merchandise Sold	
	61.3 Total Merchandise Cost of Sales	
	38.7 Gross Margin	
	37.0 Total Operating Expense	
	1.7 Net Profit	

CHAPTER III

Problem 1:	Cost	Retail	Markon \$	Markon %
	\$ 31,575	\$ 52,625		
Total Merchandise Handled	\$128,616	\$210,500	\$ 81,884	38.9
Problem 4: 61.1% Cost				
37.9% Markon				
\$38,303.06 Closing inventory at cost				
Problem 5: \$71,090 Total deductions				
\$46,873 Closing book inventory				
\$26,482 Closing book inventory				
\$4,923,330 Total inventory at retail				
\$15,000 Closing inventory at cost				
Problem 6: Shortages		72,411		
Gross Cost of Merchandise Sold	3,538,948			
Problem 7: Shortages		3,902		
Gross Cost of Merchandise Sold	296,562			

CHAPTER IV

- Problem 1: \$800 discrepancy
 Problem 3: \$20,000 - 19,200 = \$800

In Problem 1 actual cost was \$800 less than cost shown by book inventory.

Problem 5:	Cost	Retail	Markon \$	Markon %
Total Less Markdowns	\$173,308	\$285,909	\$112,601	39.4
Problem 6:	Cost	Retail	Markon \$	Markon %
	50,349	79,905	29,556	37.0
Problem 7: a) \$203 Shortages				
b) 24,926 is the closing cost inventory before markdowns				
c) \$25,841 is the closing cost inventory after markdowns				

CHAPTER V

Problem 4: J. T. Carson Co., Department A			
Gross Margin		9,492.46	37.1
Net Profit		690.12	2.7
J. T. Carson Co., Department B			
Gross Margin		3,072	38.4
Net Profit		656	8.2
J. T. Carson Company			
Gross Margin		12,564.46	
Net Profit		1,346.12	

APPENDIX E

CRITERIA FOR EVALUATION AND GRADING OF RETAILING AND
MERCHANDISING COMPONENTS

COPY OF TRADITIONAL INSTRUCTIONS
FOR FINAL RETAILING PROJECT

Present an original design for a store or department, justifying all of your decisions. Decisions should include all areas of study in RET 275 and should provide a synthesis of the course in practical application.

Decide on: Type of Store

 Retail Mix employed

 Trading Area and Evaluation

 Retail Site - selection and evaluation

 Layout

 Organization

 Promotion

 Retail Services

 Expense Control - statement

 Type of Control for sales transactions

 Research used

Bibliography should be included

September 1975
KC:gj

Student Instructions for Writing Project for Retailing Component:
Competency-Based Format

Assignment: Present an original design for a store or department justifying all of your decisions. Decisions should include all areas of study in Retailing 275 and should provide a synthesis of the course in practical application.

Decide on: Type of store
Retail mix employed
Trading area and evaluation
Retail site--selection and layout
Organization
Promotion
Retail Services
Expense control statement
Type of control for sales transactions
Research used.

Bibliography should be included.

Specific Objectives by Modules:

Module 1. Choose a specific type of retail business to design on paper. The retail business may be a whole store or a department within a store. The rationale for choice will be described specifically in the terms of the elements of the retail mix.

Module 2. Retail Research--see attached module objectives.

Module 3. Collect and interpret data pertinent to and make a decision about the location of the retail business selected. All decisions will be justified through research in sources identified in Module 2.

Module 4. Choose the appointments of the physical plant, fixtures, lighting and decor of the retail business selected, and justify decisions on the basis of principles in Modules 1 and 4.

Layout will be demonstrated by drawing a diagram for the business selected, with all decisions justified on the basis of principles in Modules 1 and 4.

Module 5. Develop the organization of the business selected, justifying all decisions on the basis of principles in Module 5.0. Organizational decisions will include all personnel needs.

Module 6. Develop the sales promotion strategies for the retail business selected. Indicate plans for advertising,

Project Retailing 275...continued

publicity and display. All decisions will be justified by principles from Modules 1. and 6.

Present a promotional calendar based on these decisions.

Calculate the approximate costs of advertising placed in chosen media (i.e., cost of newspaper space, T.V. and radio time). Sources of data for calculations will be documented.

- Module 7. Select customer services for the retail business selected and analyze the types and need as suggested by the retail side.

Present a policy outline for retail credit policy for the business selected and justify choice on the basis of principles in Module 7.

- Module 8. Estimate the expenses of the retail business selected and justify the estimates on the basis of documented research in sources suggested in Modules 2 and 8.

Select a method of control of sales transactions for the retail business selected and justify the decisions on the basis of principles in Module 8.

Sample Student Criteria Sheet for Writing One Module
of Project in Retailing Component: Competency-Based Format

MODULE IV

RETAIL ORGANIZATION

CRITERIA FOR PROJECT

1. Adapt one of the common organizational structures to the needs of your business and justify the changes by application of at least 4 out of 6 principles reflected by objective 5.1. (Specific documentation is required, i.e., footnoting by page number or brief quotations where appropriate).

Include external relationships as well as internal relationships if they apply in your case.

Grade B. Competency Level

2. Develop a plan for personnel management (selling and non-selling) for your business which includes the following:

- a. number of employees
- b. hours worked
- c. methods of compensation including fringe benefits
- d. training plans
- e. methods of evaluating employees

Grade A. Competency level B plus decisions made reflect application of data collection or information researched outside text and/or classroom.

Grade C. Competency level B criteria not met.

All decisions must meet legal requirements. All decisions must be justified by application of principles in objective 5.2.

Limit paper to 3-4 pages if possible.

FORM FOR FACULTY ASSESSMENT OF FINAL PROJECT IN RETAILING COMPONENT:

MODULE I - III

THE STRUCTURE AND ENVIRONMENT OF RETAILING TODAY
RESEARCH IN RETAILING
RETAIL LOCATION

Comp. No.		Comp Level	(+)	(-)
	1. <u>Rationale</u>			
1.1	a. Describe type of retail institution or department chosen. (department, variety, etc.)			
	b. At least 4 out of 7 elements of retail mix must be mentioned and congruent in their application with the general definition of current retail institutions.			
	Location _____			
	Layout _____			
	Service _____			
	Merchandising _____			
	Pricing _____			
	Promotion _____			
	Organization _____			
	2. <u>Retail Location</u>			
3.4	Justify choice of site by citing at least 7 characteristics, e.g.			
	a) demographic			
	b) other			
	age _____			
	sex _____			
	income _____			
	population _____			
	at least 2 different resources must be used to justify choice of location			

EVALUATION FORM - RETAILING COMPONENT CONT'D

MODULE IV

STORE BUILDING

Comp. No.		Comp. Level	(+)	(-)
4.1a.	<u>Building:</u> describe using at least 7 characteristics clearly			
	Outside: Entrance _____			
	Windows (open-closed) _____			
	Construction material (if applicable) _____			
	Inside: Decor _____			
	Type covering (wall, floor, etc.) _____			
	Lighting _____			
	Traffic pattern (why?) _____			
	Fixtures appropriate for storing and display merchandise within the selling area _____			
	Equipment appropriate to business _____			
	Self-select or self-service decision _____			
4.2	<u>Layout - match with diagram</u> (6 out of 8 for comp. level)			
	Entrances, exits _____			
	Fitting rooms _____			
	Where fixtures drawn agreed _____			
	Office space designated _____			
	Cash register) security _____			
	Checkouts) reasons _____			

EVALUATION FORM - RETAILING COMPONENT CONT'D.

MODULE IV - cont'd.

Comp. No.		Comp. Level	(+)	(-)
	Marking and receiving area			
	Stock room			
	Lounges - accessible to customer			
	Above B - evidence outside research in materials and fixtures for at least 2 items			

MODULE V

RETAIL ORGANIZATION

5.1	Competency level	At least 4 out of 6		
5.11	there/not + appropriate to <u>size</u> or <u>needs</u> of business	Organizational chart		
5.12	yes/no + why	Departmentalization		
5.13	job department descript. + reasonable responsibility for type operation and factual level reasonable for type operation. Above: in depth des- cription and research beyond text.	Organizational activities & job descriptions		
5.13	separate or together + why	Buying and selling		
5.14	-describe relationship-	Branch/main store		
5.16	-describe relationship-	Ownership groups		

EVALUATION FORM - RETAILING COMPONENT CONT'D.

MODULE V - cont'd.

Comp. No.		Comp. Level	(+)	(-)
5.2				
5.24	salaries, commissions, benefits, social security, vacations, discounts	Number employees Hours worked		
5.26	(3 out of 5 for B)	Methods of compensation		
	-how training carried on: type (there or not) (who did it + how carried through)	Training		
5.23				
5.25	method of review: how often (there or not)	Evaluation		
	B. listed from text only			
	A. used sources outside text and/or classroom which were reflected in paper			

MODULE VI

SALES PROMOTION

	1. Advertising: Justify your decisions on the basis of at least 5 out of 8 principles. (listing or text regurgitation not sufficient)			
	Type promotion/adv:			
6.21	Distinguish between advertising and publicity			
6.22	Describe advantages and limitations of advertising			
6.23	Type of advertising (direct, indirect, combination)			
6.24	Financing (adv. and disadv. financing adv.)			
6.25	Copy and illustration			
6.26	Identify preferred sections newspaper			
6.27	Type media (including display)			
6.28	3 Special events			
6.29	Legislation requirements met by (piece promotional material) (only mention any main provision i.e. "be truthful."			

EVALUATION FORM - RETAILING COMPONENT CONT'D.

MODULE VI - cont'd.

Comp. No.		Comp. Level	(+)	(-)
6.31a	2. Budget estimate (congruent with business and justified). All data must be documented for cost estimate for media.			
6.31b	Promotional calendar (congruent with business and justified)			
	3. Sales policy: Dmonstrate <u>application</u> of 4 of the following sales options to their business.			
6.41	Advantages and disadvantages of telephone and mail orders			
6.42	Examples of current emphasis on packaging			
6.43	List ways labelling promotes sales			
6.44	Provisions of "The Truth in Packaging Act"			
6.45	Advantages and disadvantages of consumer premiums			
6.46	Current status of (must be a separate statement may apply to individual store)			
6.47	Ways to improve retail salesmanship (any two methods i.e. merchandise information: ask management etc. may be included 4 elements)			
6.48	Interrelationship between 4 basic elements (store, customer, merchandise, clerk)			
6.49	Steps in the selling process			
Noté:	At least 2 sources other than test and lectures must be used in Modules			

MODULE VIII

INTRODUCTION TO CONTROL

8.12	Describe expenses plan and relate expenses to 4 areas of expense control			
	a. define and classify (classify by one appropriate method to department and function)			

EVALUATION FORM - RETAILING COMPONENT CONT'D.

MODULE VIII - cont'd.

Comp. No.		Comp. Level	(+)	(-)
	_____ b. allocate appropriately			
	_____ c. budget + analyze (dollar or percentage and relate your business to budget figure)			
	_____ d. corrective action (at least one specific budget item mentioned)			
8.24	Describe sales transaction in relation to all three:			
	_____ a. types (any type appropriate to business)			
	_____ b. method recording (any type merchandise appropriate to business)			
	_____ c. equipment (at least one price appropriate equipment)			
	_____ At least one reference outside text and lecture.			

RATIONALE FOR GRADING: RETAILING COMPONENT: COMPETENCY BASED FORMAT

QUIZZES AND PROJECT MODULES

Quizzes 1. Minimum points allowed to pass:

- 25 questions a) 14 points on the 1st quiz, if below
14, quiz must be repeated.
- 10 questions each b) 6 points each 2nd quiz through 6th quiz,
if below 6 points, quiz must be repeated.

Total questions of all quizzes - 75

	2.	85% of 75 questions = 64 points = A
40% of		75% of 75 questions = 56 points = B
Final		65% of 75 questions = 49 points = C
Grade		59% of 75 questions = 44 points = D

Project Each project: Module will be assigned a lettergrade.

60% of (All lettergrades will be averaged into a single lettergrade)
Final
Grade All project Modules should include footnotes as well as
bibliography. Please do all future modules with carbon
or make a copy. Pass in original paper only, grade and
comments will be returned to you.

First Problem Research

On first research questionnaire students receiving below
80% must repeat to pass. New forms must be picked up in
Room 312. If you feel your original answer is correct,
record source, year and page number and the question will
be reviewed.

STUDENT INSTRUCTIONS FOR WRITING PROJECT FOR MERCHANDISING
COMPONENT: TRADITIONAL FORMAT

FINAL PAPER

1. Implement all the techniques we have studied in merchandising a store or department of your choice.
2. Use as accurate figures as possible so that the plans could be of value in an actual situation.

Figures are available from sources such as NRMA, Federal Reserve, Fairchild's Financial Manual of Retail Stores, Department of Commerce, Small Business Bureau, others as listed in your text. Figures are available on a monthly basis for different kinds of stores and departments. The most recent figures will be found in the Reference Room of the main library.

3. Decide on your method of accounting. Based on #2, present a sample operating statement of your business.
Decide on your method of merchandise management.
Decide on your method of merchandise control.
Decide on your resources, terms, mark-up, price lines, assortments.

Present a six month's budget based on #2, taking into consideration market conditions, trends, etc.

Present a buying plan for the central market of your choice. Sample open to buy statement.

Decide on whether you will or will not use a resident buying office.

4. Your plans for merchandising should also include decisions for brand names, private or store label, etc. - the retail mix - the balancing of the mix will depend on the image of your store and the customer you intend to serve.
5. Plan how your merchandise will be received and what will happen to it until it is sold.

Your decisions should be justified.

Include a Bibliography.

STUDENT INSTRUCTIONS FOR WRITING PROJECT FOR MERCHANDISING COMPONENT:
COMPETENCY-BASED FORMAT

MODULE I - II

ACCOUNTING PROCEDURES

MERCHANDISE MANAGEMENT AND THE MERCHANDISE BUDGET

CRITERIA FOR COMPETENCY LEVEL B

- Module I Apply competency 1.3 (1.31 through 1.35) to your project.
- a. at least one outside reference must be used as a base to support all your figures
 - b. round off decimal to one place - ex. $2.38\% = 2.4\%$
 $2.54\% = 2.5\%$
 $2.06\% = 2.1\%$
 - c. accuracy in process of computation is expected
minor arithmetical errors will not affect grade
providing the numbers are not of such proportion they
will affect the congruency of your statements.

- Module II Apply competency 2.3 (2.31 through 2.34)
- a. at least one outside reference must be used as a base to support all your figures
 - b. accuracy as in c Module I

CRITERIA FOR A GRADE OF A - MODULE I AND II

Competency of Level B plus decisions made that reflect application and information researched outside of texts and classroom with at least 3 outside sources as references

CRITERIA FOR A GRADE OF C - MODULE I AND II

Below competency level B
Serious error in arithmetic that would affect major statements, then decisions could not be congruent with figures

CRITERIA BELOW C - MODULE I AND II

Level C not achieved. Descriptive without needed computations

Figures throughout Module I - IV should be consistent so that both papers together reflect unified decisions regarding your business. For example if sales on profit and loss statement are for 6 months - should be reflected with adjustments in 6 months plan for the same period. If statement is for a year then 6 months plan would reflect sales proportionate to the months chosen.

MODULES III - IV

PRICING AND BUYING MERCHANDISE

CRITERIA FOR COMPETENCY LEVEL B

- Module III Apply competency 3.4 (3.41 - 3.44) to your project.
- a. At least one outside reference besides texts and classroom must be used as a basis to support all your figures and decisions. Pricing decisions should reflect consistency of previous figures in Module I and II.
 - b. Accuracy in process of computation is expected; minor arithmetical errors will not affect grade providing the numbers are not of such proportion that they will affect the congruency of your statements.
- Module IV Apply competency 4.5 (4.51 - 4.58) to your project.
- a. at least one outside reference besides texts and classroom should be used to support all your decisions.
 - b. sample trip buying plan should reflect figures taken for month or months and dollars planned from 6 months budget in Module II

CRITERIA FOR A - MODULE III AND IV

Competency level B plus decisions made that reflect application and information researched outside texts; classroom in at least 3 outside sources, material that would be appropriate for your business

CRITERIA FOR C - MODULE III AND IV

Below competency level B
Serious errors in arithmetic that would affect major statements, therefore decisions could not be congruent with figures

CRITERIA BELOW C - MODULE III AND IV

Level C not achieved. Descriptive without needed computations.

FORM FOR FACULTY ASSESSMENT OF FINAL PROJECT IN MERCHANDISING COMPONENT

FINAL PAPER MERCHANDISING COMPONENT

MODULE I AND II PAPER

GRADING PROCEDURES

Method of accounting
procedures

(-2½) if procedures were not consistent
i.e. cost in both places or Ret.
both places

Maximum Minimum
Competency Competency
5 5

Profit and Loss
statement

(+2½) - any procedure correctly described
(+2½) - procedures correctly carried
through in all statements
(+20) - complete and correct statement
(-2) - minor arithmetic error
(-2) - confused presentation
(+10) - methodology correct too many
errors

Maximum Minimum
Competency Competency
20 15

Dept. operating
statement

(+2½) - too many errors or not complete
(+5) - complete: minor arithmetic error

Maximum Minimum
Competency Competency
5 5

Balance sheet

(+5) - statement elements correct but
not balanced
(+10) - statement elements correct and
balanced
(-2) - error Math
(-2) - something left out

Maximum Minimum
Competency Competency
10 8

Six month plan

Purchases

(+5) - all correct data collected:
formula not applied
(+8) - all correct data collected: formula
applied correctly, careless error
(+10) - apply formula correctly: or minor
arithmetic error

Maximum Minimum
Competency Competency
10 8
20 15

Cumulative markon

(+3) - reasonable data all collected
but errors calc.
Cum. Markon/original retail
(+5) - reasonable data correctly calc.

MODULE I AND II PAPER - Cont'd.

GRADING PROCEDURES

		<u>Turnover</u>	
		(+3)	- reasonable data collected error in calc. <u>or</u> not divided by 7 months
		(+5)	- reasonable data - collect calc.
Method of merchandise management		(+5)	- tell <u>what</u> going to do
		(+2)	- how going to do it (i.e. 7 points minimum description no detail)
Maximum	Minimum	(+3)	- detail description of "how"
Competency	Competency	(+10)	- tell what going to do, with detail of "how"
10	7		
Open-to-buy statement		(+5)	- partial statement
		(+8)	- statement correct but opening inventories or on-hand not included
Maximum	Minimum	(+10)	- (figures from onn 6 month plan and doing guesstimate for 1 month)
Competency	Competence		
10	10		
Summarize		(+10):	text information no analysis of own type business or analysis of bus- inexx but figures inconsistent
		(+20):	full analysis relating to own business figures consistent (beyond text)
Maximum	Minimum	(-5)	- confused
Competency	Competence	(-5)	- not enough content
20	15		

MODULE III AND IV PAPER

Determining initial prices		(+5)	- listing price lines. Considerations why prices are way they are.
		(-3)	- right reasons but price line wrong or incongruous
Maximum	Minimum	(+10)	- in addition to price lines any 2 or 3 of the following appropriately discussed: competition- (below-above-at mkt.) one price; private label vs. brand: single vs. many markup: leader mdse: odd pricing: multiple pricing: operating costs
Competency	Competency	Total (+15)	- complete analysis as above (-2) for any incorrect statement
15	10		

MODULE III AND IV PAPER - Cont'd.

GRADING PROCEDURES

Determining policies for
markdowns

Maximum Minimum
Competency Competency
10 7

Total

- (+5) - any one pt. with discussion of advantage of markdowns in general but not applied to own business (markdown as too timing; amount: price lining; advertise: recording)
- (+3) - one or 2 items mentioned in own business
- (+2) - 3rd item mentioned own business
- (+10) - any 3 topics covered with discussion and applied own business with justification
- (-2) - any incorrect statements

Describing pricing
decisions Government

Maximum Minimum
Competency Competency
10 7

- (+5) - stated main laws but didn't apply to own business (Fair Trade: Robinson Patman)
- (+5) - related laws specifically to their market

Method of purchasing

Maximum Minimum
Competency Competency
10 7

- (+3) - text information not applied to store bare minimum (possible: buying policies - customer needs; past sales; basic stocks; inside-outside conditions; quantity: speculative: timing)
- (+5) - 1 item applied business and justified
- (+7) - 2 items applied business and justified
- (+10) - 3 or 4 items applied business and justified

Choosing markets

Maximum Minimum
Competency Competency
5 5

- (+2½) - described any market correctly but not appropriate decision
- (+2½) - add plausible analysis to correct decision
- (+5) - make a decision with plausible analysis
- (-1) - didn't state decision

MODULE III AND IV PAPER - Cont'd.

GRADING PROCEDURES

Major vendors

- (+2½) - some incongruity or less than 5 vendors listed
(+5) - list vendors and were congruent with their markets (5 vendors)

Maximum Competency 5
Minimum Competency 5

Use of buying office

- (+2½) - describe buying office but either didn't choose one or chose one inappropriate
(+2½) - choice buying office appropriate to business and justified

Maximum Competency 5
Minimum Competency 5

Terms of sale available

- (+2½) - everything in book-no application to business or inappropriate to business
(+5) - any one term appropriately discussed for their business (if only term and no source documentation) (-1)

Maximum Competency 5
Minimum Competency 5

Sample trip buying plan

- (+2½) - describing a plan but not filled out
(+5) - filled out a plan that made sense for their figures

Maximum Competency 5
Minimum Competency 5

Receiving, marketing and distribution process

- (+3) - (only 3 activities such as receiving, marketing, distribution, etc. described in general text terms no application to business)
(+5) - overall plan suitable their store (-1 if forgot to mention "inspect package")

Maximum Competency 5
Minimum Competency 4

CRITERIA FOR GRADING MERCHANDISING COMPONENT:
COMPETENCY-BASED FORMAT

FINAL COURSE GRADING RETAILING 276

B. Students must reach B level as described below to get a B in the course.

	Weight	Total Points	No. of Competencies at Minimum Level
Theory	15%	40 out of 60	3/4 (#1.1, 2.1, 3.1, 4.1 i.e. Multiple Choice)
Computation	35%	112 out of 135	16/20
Paper	50%	80.....100 Paper I & II *80.....100 Paper III & IV	6/8 9/11

A: Theory - 48 points
Comp. -126 points
Papers - 90 points each

C: Theory - 32 points
Comp. - 98 points
Papers - 70 points each

D: Theory - 24 points
Comp. - 84 points
Papers - 60 points each

*Competencies total 75 points. Multiplied by 4/3 to give 100 points.

FORMS FOR ASSESSING AND RECORDING STUDENT COMPETENCY ACHIEVEMENT FOR
MULTIPLE CHOICE AND COMPUTATIONAL SECTIONS

Student Name _____

MODULE I

Common Accounting Procedures for Retailing

Competency	Corresponding test questions	Total	Mimumum competency level	Performance
1.1	Multiple choice questions 1-15	15	10	
1.21	1a	12	10	
1.22	1b 2b	6	3	
1.23	2c	5	4	
1.24	2a	12	10	

MODULE II

MERCHANDISE MANAGEMENT AND MERCHANDISE BUDGET

2.1	Multiple choice questions 1-15	15	10	
2.2 2.26	3b	10	8	
2.22	1	2½	2	
2.23	2	2½	2	

MODULE II CONT'D

Competency	Corresponding test questions	Total	Minimum competency level	Performance
2.26	3a 4a	15	12	
2.27	4b	5	4	

Students are required to make up specific competencies if performance is below minimum.

Those students who are going to take make-up exams: your most recent performance is used to compute your final grade.

MODULE III

PRICING MERCHANDISE

Student Name _____

(Pricing Theory) 3.1 & 3.2	M.C Question 1-15	15	9	
3.31 (Markon)	1	6	5	
3.32 (Cost Dollars)	2	14	11	
3.33 (Orig. Retail)	3	5	4	
3.34 (Markon %)	4	5	4	
3.35 (Unit and Total Markon)	5	5	4	

Students are required to make up specific competencies if performance is below minimum.

Student name _____

MODULE IV

BUYING MERCHANDISE

Competency	Corresponding test question(s)	Total	Minimum competency level	Performance
4.1 4.2 4.3	Multiple Choice Questions 1-15	15	10	
4.31 a (POG)	1	8	7	
4.31 b (Anticipation) (FOB, "extra")	2	15	11	
4.31 c (EOM)	3	4	4	
4.31 d (EOM)	4	6	5	
4.31 e (Net)	5	2	2	

COOPERATIVE WORK REPORT: TRADITIONAL FORMAT

Syracuse University
College for Human Development

Student's Name _____ Date _____

How well has student performed? _____

1. To what extent does he take responsibility? _____

2. How is his attendance? _____

3. To what extent does he take initiative? _____

4. How well does he follow through on assignments? _____

5. What comments can you make about his effectiveness on the job? _____

6. What traits may help or hinder the student's advancement? _____

Additional remarks: _____

These evaluations have been discussed with student

Yes

No

SYRACUSE UNIVERSITY

Evaluation of Student's Field Work Experience: Traditional Format

Name of Student _____ Name of Examiner _____

Type of Work _____ Title _____

Length of time Student worked in your Organization _____ Name of Organization _____

Please check most appropriate description:

1. Voice and Speech	Irritating or indistinct	Understandable but rather unpleasant	Neither conspicuously pleasant nor unpleasant	Definitely pleasant and distinct	Exceptionally clear and pleasant	Comments
2. Appearance	Unprepossessing or unsuitable	Creates rather unfavorable impression	Suitable Acceptable	Creates distinctly favorable impression	Impressive; Commands admiration	
3. Alertness	Slow in grasping the obvious. Often misunderstands	Slow to understand subtle points; must explain	Nearly always grasps intent of questions	Rather quick in grasping questions and ideas	Exceptionally keen and quick to understand	
4. Ability to present	Confused and illogical	Tends to scatter and become involved	Usually gets his ideas across well	Shows superior ability to express himself	Unusually logical, clear and convincing	
5. Judgment	Notably lacking in balance and restraint	Shows some tendency to react impulsively	Acts judiciously in ordinary circumstances	Habits of considered judgment	Inspires unusual confidence in judgment	
6. Emotional stability	Over sensitive	Occasionally impatient or irritated	Well poised most of the time	Superior self-composure	Shows exceptional poise; calmness under stress	
7. Self-confidence	Timid, easily influenced	Appears to be over self-conscious	Moderately confident	Wholesomely self-confident	Shows superb self assurance	
8. Friendliness	Keeps at a distance	Does not easily attract friends	Approachable, likeable	Draws friends	An inspirer of loyalty	
9. Personal fitness for position	Unsuited	Endorsed with hesitance	Endorsed	Endorsed with confidence	Endorsed with enthusiasm	

COLLEGE FOR HUMAN DEVELOPMENT

CRITERIA FOR PAPER GRADING: FIELDWORK COMPETENCY BASED

Student copy

1. Describe in writing the receipt of goods process by including:
 - 1.1 Checking procedures (check against purchase order)
 - 1.2 Marking procedures (including an interpretation of ticket codes)
 - 1.3 Distribution of merchandise after marking
 - 1.4 Comment on appropriateness of process used for the goods you handle (1 point for a, b and c for listing only)
2. Describe in writing, methods used for stock control, (basic and/or fashion, depending on department) by including:
 - 2.1 Description of the methods themselves
 - 2.2 How the information is used
 - 2.3 Comment on appropriateness of method for your department
3. Describe in writing merchandising procedures and tools by including:
 - 3.1 At least 11 of the following procedures and noting how they are used and who makes the decisions:

Price policy _____	Open-to-buy _____
Markon _____	Markdowns _____
Stock turnover _____	Shortages _____
Stock sales ratio _____	Gross margin _____
Percentage method _____	Buying plan for _____
Planned sales _____	market trip _____
Purchases at _____	Model stock plan _____
cost/retail _____	Basic stock plan _____
	Other _____
 - 3.2 Comment on how at least four of the procedures relate to the merchandising process
4. Analyze the advertising for your department by including:
 - 4.1 A log of ads from the department
 - 4.2 A chart of sales for one item advertised for one week
 - 4.3 Comment on the effectiveness of the ad and document your analysis

Sub-totals	Total points	Minimum Competency	(-) C (+)
#1	6	5	
1½			
1½			
1½			
1½			
#2	9	7	
3			
3			
3			
#3	15	12	
11			
4			
#4	6	5	
1½			
1½			
3			

CRITERIA FOR PAPER GRADING: FIELDWORK COMPETENCY BASED--Cont'd.

5. Describe the development of your store's image from its first establishment to the present in a maximum of two pages including documentation by including:

- 5.1 The type of store and its present image
5.2 Historical development

6. Describe and analyze the internal and external conditions that affected sales of your store during the period of your employment including:

- 6.1 Three specific examples of internal conditions
6.2 Three specific examples of external conditions
6.3 Analyze one internal condition in depth (document)
6.4 Analyze one external condition in depth (document)

7. Interpret the significance of the four or more extra opportunities that were provided (See column 3 on training plan) by:

- 7.1 Citing all the opportunities
7.2 Appropriately interpret the significance of four opportunities

DE STUDENTS ONLY

8. Describe the process of the annual physical inventory by including:

- 8.1 Outside personnel that administers physical inventory
8.2 Method of in-store supervision and recording of physical inventory
8.3 Identification of the method used (Cost or retail)

Sub-totals	Total points	Minimum Competency	(-) C (+)
#5	6	6	
2			
4			
#6	9	6	
3			
3			
1½			
1½			
#7	9	7	
1			
8			
Zero Credit Requirement			

APPENDIX F

DETAILS OF COMPARATIVE STUDENT COMPETENCY

ACHIEVEMENT ON FINAL PROJECTS

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY LEVELS ON
COMPETENCIES BASED ON TRAINING PLAN ACTIVITIES
IN COOPERATIVE FIELDWORK SYRACUSE
COMPETENCY-BASED PROGRAM

Student No.	Competency Number										Total	%
	1-16	17	18	19	20	21	22	23	24			
1	15	1	1	1	1	*	1	1	1	22	96	
2	16	1	1	1	1	*	1	1	1	23	100	
3	16	1	1	1	1	*	1	1	1	23	100	
4	16	1	1	1	1	*	1	1	1	23	100	
5	16	0	0	1	0	*	1	0	1	19	83	
6	16	1	0	1	0	*	0	0	1	19	83	
7	15	0	1	1	1	*	1	0	1	20	87	
8	15	1	1	1	1	*	1	1	1	22	96	
9	16	0	0	0	0	*	0	0	1	17	74	
10	15	1	1	1	1	*	1	1	0	21	91	
11	12	1	0	1	1	*	0	0	1	16	70	
12	12	1	1	1	0	*	1	0	1	17	74	
13	8	1	0	1	0	*	0	0	0	10	52	
14	15	1	1	1	1	*	1	1	1	22	96	
15	13	1	0	0	0	*	0	1	1	15	65	
16	14	0	0	0	0	*	0	0	1	15	65	
17	13	1	0	1	0	*	1	0	1	17	74	
18	16	1	1	1	1	*	1	0	1	22	96	

*All DE students met this competency, required only of them. Retailing majors treated it as an extra opportunity.

TABLE 1

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY LEVELS IN FINAL RETAILING PAPER: SYRACUSE UNIVERSITY COMPETENCY-BASED MODE

	Student Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	Total Correct
MOD I - III	Rationale Mix	1	1	1	1	1	1	1	1	1	1	0	1	1	1	0	1	1	1	1	1	1	1	0	1	1	1	23
	Location	1	1	0	0	1	0	1	1	1	1	1	1	1	1	1	1	1	1	1	0	1	1	0	1	1	1	21
MOD IV	Building	1	1	1	0	1	1	1	1	1	1	1	1	1	1	0	1	1	1	1	1	1	1	0	1	1	1	23
	Layout	1	1	1	0	0	1	0	0	1	1	0	0	1	1	0	0	1	1	1	0	1	1	1	1	1	1	17
MOD V	Organization	1	0	1	1	0	1	1	0	0	1	0	0	0	0	0	1	0	1	1	0	1	1	0	1	1	1	14
	Personnel	1	1	0	1	0	1	0	0	1	1	0	0	0	0	0	0	0	0	1	0	1	1	0	1	0	1	11
MOD VI	Advertising	1	1	1	1	1	1	1	1	1	1	1	1	1	0	1	1	1	1	1	0	0	1	0	1	1	1	22
	Budget	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	1	0	0	1	1	0	1	1	1	1	22
	Promotion Calendar	1	1	1	1	1	1	1	1	1	1	1	1	1	0	1	1	1	0	1	0	1	1	0	0	1	1	21
	Sales Policy	1	1	1	0	1	1	1	1	0	1	1	1	0	0	0	0	0	0	1	0	0	0	0	0	1	0	1
MOD VII	Customer Service	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	1	1	0	1	1	1	24
	Credit	1	0	1	1	1	1	1	1	1	1	0	1	1	0	0	0	1	0	1	0	1	0	0	0	1	1	0
MOD VIII	Expenses	1	1	0	0	0	0	1	1	1	1	1	1	1	0	0	0	1	0	0	0	1	1	0	0	0	1	13
	Sales Transactions	1	1	1	1	1	1	1	1	1	1	0	1	1	1	1	1	1	1	1	0	1	1	0	1	1	1	23
	Competencies Achieved	14	12	11	9	10	12	12	11	12	14	8	11	11	7	6	9	10	9	12	2	12	12	1	12	11	13	

TABLE 2

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY LEVELS IN FINAL RETAILING PAPER: SYRACUSE UNI. TRADITIONAL MODE 1973

	Student Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	Total Correct
MOD I - III	Rationale Mix	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	19
	Location	0	1	1	1	1	1	1	1	1	0	1	1	1	1	1	1	0	1	1	16
MOD IV	Building	0	1	1	0	1	0	1	1	1	0	0	0	0	1	0	1	0	0	0	8
	Layout	1	1	1	1	1	1	1	1	0	1	1	0	1	1	1	1	0	1	1	16
MOD V	Organization	1	0	1	1	0	1	0	0	1	0	1	1	1	1	0	1	1	1	0	12
	Personnel	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1
MOD VI	Advertising	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1
	Budget	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	Promotion Calendar	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	0	0	0	0	3
	Sales Policy	1	1	0	0	0	0	0	0	1	0	0	0	1	1	1	0	0	0	0	6
MOD VII	Customer Service	1	1	0	0	0	1	1	1	1	0	1	0	1	1	1	1	0	1	1	13
	Credit	0	1	1	0	1	1	0	0	0	1	0	0	0	1	0	1	0	1	1	9
MOD VIII	Expenses	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sales Transactions	1	1	1	0	1	1	1	1	1	1	1	1	1	1	0	1	0	1	1	16
	Competencies Achieved	6	8	7	4	6	7	6	6	7	4	6	6	7	10	5	8	3	7	6	

TABLE 3

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY LEVELS IN FINAL RETAILING PAPER: BUFFALO

	Student Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	Total Correct
MOD I - III	Rationale Mix	1	1	1	0	1	1	1	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	33
	Location	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
MOD IV	Building	0	0	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	1	0	5
	Layout	1	1	0	1	1	1	0	0	0	0	1	1	0	0	1	1	0	1	1	1	1	1	0	1	1	1	1	0	1	1	0	0	0	0	0	19
MOD V	Organization	1	1	0	0	0	0	0	0	0	0	0	1	1	0	1	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	6	
	Personnel	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
MOD VI	Advertising	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	2	
	Budget	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	
	Promotion Calendar	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	
	Sales Policy	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	
MOD VII	Customer Service	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1	0	1	1	0	0	0	0	1	0	0	0	6	
	Credit	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	4	
MOD VIII	Expenses	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	
	Sales Transactions	0	0	0	0	0	0	0	0	1	0	0	0	1	1	1	0	0	1	0	0	1	1	0	1	0	0	0	1	0	0	0	1	0	0	11	
	Competencies Achieved	3	3	1	1	3	3	1	0	2	1	2	4	4	3	4	2	1	0	2	3	3	3	2	5	4	3	2	3	2	1	1	5	1	2	3	

TABLE 4

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY LEVELS IN FINAL RETAILING PAPER: SYRACUSE UNIVERSITY TRADITIONAL MODE - 1975

		Student Number																																Total Correct
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	
MOD	Rationale Mix	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	32
I - III	Location	1	1	1	1	0	1	1	1	1	1	1	1	1	0	1	1	1	1	1	1	1	0	1	1	1	0	1	1	1	1	1	1	28
MOD	Building	1	1	0	1	0	1	0	0	0	1	0	1	0	1	1	1	1	0	1	1	1	0	0	1	1	0	0	1	0	0	0	0	16
IV	Layout	0	1	0	1	1	0	0	1	1	0	1	0	1	0	1	0	1	0	1	0	0	1	1	1	0	0	0	0	1	0	1	0	15
MOD	Organization	1	0	1	0	0	0	1	0	0	0	1	0	1	0	0	1	1	0	1	0	1	0	0	1	1	0	0	1	1	0	0	0	13
V	Personnel	0	0	0	0	0	0	0	1	1	0	1	1	1	1	0	1	1	0	0	1	1	0	1	1	0	0	1	0	0	0	0	0	15
	Advertising	0	0	0	0	0	1	0	0	0	0	1	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	4
MOD	Budget	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
VI	Promotion Calendar	1	1	1	0	1	1	0	1	0	0	1	1	0	1	0	0	1	1	1	0	0	0	0	0	1	0	0	0	0	0	0	0	13
	Sales Policy	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
MOD	Customer Service	1	0	0	0	0	1	1	0	1	1	0	1	1	0	0	0	1	0	1	1	0	1	1	1	1	0	0	1	0	0	0	0	16
VII	Credit	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1	0	0	1	1	0	1	0	1	0	0	0	5
MOD	Expenses	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1	0	1	0	0	0	1	0	0	0	0	0	0	0	4
VIII	Sales Transactions	1	1	0	1	1	1	1	0	0	1	1	1	1	1	1	0	1	1	1	1	1	0	1	1	1	1	1	1	1	0	1	0	25
Competencies Achieved		7	6	4	5	4	8	6	5	4	8	7	7	7	5	6	5	9	5	9	5	8	7	4	8	10	5	2	7	6	3	4	2	

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY LEVELS IN FINAL MERCHANDISING PAPER: SYRACUSE UNIVERSITY COMPETENCY-BASED MODE

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TABLE 6

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCIES IN FINAL MERCHANDISING PAPER: BUFFALO

	Student Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	Total Correct
MOD I	Method Accounting	1	0	0	1	1	1	1	0	0	0	1	1	1	1	0	0	0	1	1	0	1	1	1	1	1	0	1	1	0	18
	Profit & Loss	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Dept. Oper. State.	1	0	1	1	1	1	1	1	0	0	1	1	1	1	0	1	1	0	1	0	1	1	1	1	0	0	1	1	1	21
	Balance Sheet	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
MOD II	6 Months Plan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Method Mdse. Mngmt.	1	1	0	1	1	1	1	1	0	1	0	0	0	0	1	0	1	0	1	0	1	1	0	0	0	0	0	1	1	14
	Open to Buy	0	0	1	0	0	1	0	0	1	0	0	0	0	1	1	0	0	1	1	0	1	0	0	0	1	1	0	0	0	10
	Summarize	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
MOD III	Det. Initial Prices	1	0	0	1	1	1	1	0	0	0	0	1	1	1	0	0	0	1	1	0	1	1	0	0	1	0	0	1	0	14
	Policy Markdowns	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Pric. Decis. Gov't.	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
MOD IV	Method Purchasing	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	1	0	0	0	1	0	0	0	0	0	5
	Choosing Markets	1	1	0	1	1	1	1	0	0	0	0	0	0	1	0	1	0	1	1	0	1	1	0	0	1	0	0	1	1	15
	Major Vendors	1	0	0	0	1	1	1	0	1	0	0	0	0	0	1	0	0	0	1	0	1	0	0	0	0	0	0	0	0	8
	Use Buying Office	1	0	1	1	1	1	1	0	0	0	0	0	0	1	0	0	0	0	1	0	1	1	0	0	0	0	0	1	0	11
	Terms Sale Available	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	Sample Trip Buy. Plan	0	0	1	0	0	0	0	1	0	0	1	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4
	Rec. Mkt. and Distrib.	1	0	0	0	1	1	1	0	0	0	0	0	0	0	0	0	1	1	1	0	1	1	0	0	1	0	0	0	0	10
	Competencies Achieved	8	2	4	7	8	9	8	3	3	0	3	3	3	8	3	2	3	6	10	0	10	7	2	2	6	1	2	6	3	

TABLE 7

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY IN FINAL MERCHANDISING PAPER: SYRACUSE TRADITIONAL PAPER

	Student Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	Total Correct			
MOD I	Method Accounting	1	0	1	1	1	1	1	1	1	1	1	0	1	1	0	1	1	0	1	1	1	1	1	1	1	0	1	0	1	1	1	1	1	1	1	1	0	1	0	1	1	1	1	1	36		
	Profit & Loss	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
	Dept. Oper. State. Balance Sheet	1	0	1	0	0	0	0	1	0	1	0	0	0	1	1	1	1	0	1	1	0	0	1	1	1	1	0	0	0	1	1	1	1	1	0	0	0	1	1	1	0	0	1	-	-	24	
MOD II	6 Months Plan	0	1	1	0	0	0	0	0	1	0	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1	1	0	0	0	1	1	1	1	1	0	0	0	0	0	0	0	0	1	-	-	19	
	Method Mngt. Mngmt.	1	1	1	1	1	1	1	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	1	1	1	1	1	1	1	1	1	1	1	1	1	41			
	Open to Buy Summarize	1	1	1	1	0	1	1	1	1	1	1	0	1	1	1	0	0	1	1	1	0	0	1	1	1	1	1	1	1	1	1	0	0	1	1	1	0	0	0	1	1	0	0	0	-	-	30
MOD III	Det. Initial Prices	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	43		
	Policy Markdowns	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-			
	Pric. Decis. Gov't.	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
MOD IV	Method Purchasing	1	1	1	1	1	1	1	1	1	1	1	1	0	1	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	1	1	1	1	0	1	1	1	1	1	1	1	38		
	Choosing Markets	1	0	1	1	0	1	1	1	1	0	0	1	1	1	1	1	1	0	0	1	1	0	1	0	0	1	1	1	1	1	1	1	0	1	1	1	1	1	0	1	1	1	0	1	-	-	31
	Major Vendors	1	1	1	1	0	0	1	0	1	1	1	1	1	1	0	1	1	1	1	1	0	0	0	0	0	1	0	0	1	1	1	1	1	0	0	1	1	1	1	1	1	1	1	1	1	31	
	Use Buying Office	1	0	1	1	0	1	1	1	1	1	0	1	1	1	1	1	0	1	1	1	1	1	1	1	1	1	1	0	0	1	0	0	0	1	0	0	1	0	0	1	1	0	1	-	-	29	
	Terms Sale Avail.	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	2		
MOD IV	Sample Trip Buy. Pl.	0	0	0	0	0	1	1	0	0	1	1	1	1	0	1	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	11	
	Rec. Mkt. & Distrib.	1	1	1	1	1	1	1	1	1	0	1	1	1	1	1	1	1	1	1	1	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	41		
	Competencies Achieved	11	7	12	9	5	9	10	9	9	13	7	9	12	10	10	10	7	7	10	10	9	6	11	10	10	13	9	9	8	11	6	10	12	12	9	4	8	9	10	10	8	6	10	-	-		

TABLE 8

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY LEVELS IN CO-OPERATIVE WORK EXPERIENCE PAPER: SYRACUSE UNIVERSITY TRADITIONAL MODE

Student Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	Total Correct
Receipt of Goods	1	0	1	0	1	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	6
Stock Control	1	1	0	1	1	0	1	0	0	1	0	0	0	1	0	0	1	1	1	1	0	0	1	0	1	1	14
Merchandising Process	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	1	0	0	2
Advertising	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1
Image and History	1	1	1	1	1	1	1	1	0	1	1	1	0	1	1	1	1	1	1	1	1	0	0	1	1	1	22
Factors Affecting Sales	1	1	1	1	1	1	1	1	0	1	1	1	1	1	0	0	0	0	1	1	1	1	0	1	0	1	19
Extra Opportunities	1	1	1	0	1	0	1	0	1	1	1	0	0	0	1	0	1	1	0	1	1	0	0	0	0	0	13
Competencies Achieved	5	4	4	3	5	2	4	2	1	5	3	2	1	3	2	1	3	3	4	5	3	1	2	3	2	4	77

TABLE 9

STUDENT ACHIEVEMENT OF MINIMUM COMPETENCY LEVELS IN CO-OPERATIVE WORK EXPERIENCE PAPER
SYRACUSE UNIVERSITY COMPETENCY-BASED

Student Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	Total Correct
Receipt of Goods	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	17
Stock Control	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	17
Merchandising Process	0	1	0	0	1	1	0	1	1	1	1	1	1	0	1	1	1	12
Advertising	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	1	0	15
Image and History	1	1	1	1	1	1	0	1	1	1	1	0	1	1	1	1	1	15
Factors Affecting Sales	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	17
Extra Opportunities	1	1	1	1	1	1	0	1	1	1	1	0	1	1	1	1	1	15
Competencies Achieved	6	7	6	6	7	7	4	7	7	7	7	5	7	6	6	7	6	108

APPENDIX G

RESUMES

Program Director

Charlotte M. Raphaelson
311 Slocum Hall
College for Human Development
Syracuse University
Syracuse, New York 13210

Telephone: (315) 423-2325
(315) 423-2397
(Office of the Dean)

Title: Assistant Professor
Program Chairman of Retailing and Distributive Education

Education:

M.A., Environmental Arts, S. U., 1971
Graduate Study in Vocational Technical Education, Rutgers, The
State University of New Jersey, 1968-69
B.S., Merchandising, Boston University, 1943
Diploma, Home Economics, Boston University, 1941

Academic Experience:

Co-Designer of the new dual major with the College for Human
Development and the School of Management, S.U., 1973.
Designer of the new Distributive Education program at Syracuse
University, a dual major with the School of Education and Human
Development, 1972.
Redesign of the Retailing Program at S.U. to include a member of
the Cooperative Education Association and listed in their
Director, cooperative work experience in retailing plus other
innovations.

Professional Experience:

1967- Bamberger's, Plainfield, New Jersey.
1968 As manager, Customer Service, was responsible for mail and telephone
sales, payment and special events desk, complaint department, and
switchboard personnel.
1966- Sears, Roebuck, Watchung, New Jersey.
1967 As supervisor, Unit Buying Control, supervised group of eight women,
responsible for continuous tabulation of merchandising data for
inventory control purposes.
1943- Filene's, Boston, Massachusetts.
1946 Merchandising Division; completed Filene's Executive Training
Course; various merchandising assignments.
1939- Filene's, Boston, Massachusetts.
1943 Part-time student and summer employment. Primarily sales respon-
sibilities. During 1941, set up Infant's Department to conform
with pricing laws established by the Office of Price Administra-
tion of the Federal government.

Kenneth F. Crystal
301 Orchard Street
Fayetteville, New York 13066

Telephone: (315) 637-8863 (Home)
(315) 637-5011 (Work)

Education:

Bryant College, Providence, Rhode Island. B.S. in
Business Administration.
Major: Management. Minor: Economics

Work Experience:

1968 to
present

Sears, Roebuck and Company

Job Assignments:

September 1968 to April 1969: Management Trainee, Eastfield
Mall, Springfield, Mass.

April 1969 to November 1969: Manager of Gift and Lamp Dept.
and also Record Dept. at the West Springfield, Mass. store.

November 1969 to February 1971: Manager of Men's Store, West
Springfield, Mass.

February 1971 to May 1971: Assistant Group Fieldman for Men's
Category, Connecticut Valley Group Office, New Britain,
Connecticut.

May 1971 to June 1973: Wearing Apparel and Home Fashions
Category Merchandise Manager, New Hartford, New York.
Responsibilities included: coordination of buying;
visual merchandising and advertising; inventory budgeting;
control of turnover and gross profit; direct supervisor of
nine dept. managers and approximately sixty full and part-
time employees. The volume under my control was four million
dollars.

July 1973 to August 1974: Wearing Apparel and Home Fashions
Category Merchandise Manager, Syracuse, New York. Responsi-
bilities in addition to those of previous assignment included
the closing of this store and the opening of an 84,000 sq.
ft. unit in Fayetteville, N. Y., where I was involved in the
layout, buying and hiring for the new store.

August 1974 to present: Wearing Apparel, Specialty Category
Merchandise Manager, and Retail Inventory Management
Coordinator, Fayetteville, N. Y.

Allan L. Korn
61 A Georgian Lane, Apt. 1
Williamsville, N. Y. 14221

Telephone: (716) 688-8875 or
862-5801

Education:

University of Alabama, B.S. Bachelor's program.
New York University. Master's program, Business Administration
and Retailing
State University of New York at Buffalo. Ed.D. in Curr. &
Inst. (Occup.-Career Ed.)

Experience:

1969 to Chairman, Consumer and Business Studies Dept., BSUC.
present
1961 - Vice President, Sattler's Inc., Director of Stores and
1969 Marketing.
1958 - General Store Manager, Snellenberg, Philadelphia and Atlantic
1961 City.
1957 - Director of Sales Promotion and Merchandise, Maurice Pollack,
1958 Ltd., Quebec City, Canada.
1951 - Oppenheim Collins, New York City and Buffalo General Store
1957 Manager,
1947 - Merchandise Controller, Inter-State Department Stores,
1951 New York City.
1947 - Instructor in New York University Evening School - Marketing,
1953 Management, Sales Promotion.
1954 - Lecturer in Millard Fillmore College - Marketing, Management,
1969 Merchandising.

Papers Presented and Published:

"Motivating the Motivators." Published in Canadian Textile Magazine,
April 1958.
"Upward and Downward Communication and Motivation in Multi-Unit Department
Store Companies." Presented at National Retail Merchants Association
Third Annual Branch Store Institute, May 1967.

Robert J. Cinelli
5766 Susanne Dr.
Lockport, New York 14084

Telephone: 439-2189

Education:

SUNY at Buffalo, Division of Curriculum Development and Instructional Media. Ed.D. received September 1, 1974 - emphasis on Occupational Educational Administration.

Canisius College, 1965-1969. M.S. in Business Education.
1965-1968, Maryvale High, DE teach.-coord. and work placement, Coord. DE and Bus. Ed.

Canisius College, 1958-1965. B.S. in Management and Economics and certified in D.E.

Business Related Experience:

1956- Linde Div. - Union Carbide Corporation, Buffalo, N. Y.
1965 All phases of Production Control and inside sales.

1963- Custom-Craft Aluminum Sales, Inc., Buffalo, N. Y.
1967 President and Co-owner of small corporation dealing in customer sales and service.

1975 Management Information Services, Middleport, New York
Systems and Consulting firm - Consultant 1975.

Professional Experience:

1969 - Niagara County Community College.
present Associate Professor of Business Administration, Div. Academic
Advisor Coordinator of Business Administration Department.

1964- Niagara County Community College.
1969 Instructor in the Continuing Education Division.

1968- Buffalo School System, Kensington High. Bus. and DE.
1969

Marilyn Chaifetz
Bernard M. Baruch College

Education:

B.S. in Retailing, New York University, 1955.
M.A. in Education/Psychology, Manhattanville College, 1974.
Enrolled Ed.D., Business Education Department, New York
University, 1974.

Academic Experience:

1975 - Adjunct Lecturer, Marketing,
present Westchester Community College.
1974 - Adjunct Lecturer, Marketing,
present Bernard M. Baruch College.
1973 - Consultant, Psychology, Edgemont High School,
1975 Scarsdale, N. Y.
1/73 - Adjunct Professor, Fashion Buying and Merchandising,
6/73 Fashion Institute of Technology.
1968 - Substitute Teacher, Hillside School,
1972 Hastings-on-Hudson, N. Y.

Other Experience:

6/62 - Dress Showroom Manager, Guy D.
9/63
6/61 - Dress Showroom - Sales - Publicity - Coordinator of TV wardrobes,
6/62 Mr. Mort.
12/55 - Buyer and Fashion Coordinator, Directed Fashion Clinics for
12/59 Member Stores, Steinberg-Kass Buying Office.
7/55 - Assistant Buyer,
12/55 Felix Lilienthal Buying Office.
6/54 - Assistant Buyer,
9/54 May Company.

Publications:

Steinberg-Kass, Personnel Manual
Fashion Newsletter, Fashion Catalogs and Fashion Coordination
summaries at Steinberg-Kass Buying Office, 1955-59.

David J. Rachman, Ph.D.
3 Hawthorne Terrace
Great Neck, New York 11023

Telephone: (516) 487-2596

Experience:

Present Professor of Marketing and member of the Doctoral Faculty at the Bernard M. Baruch College of The City University of New York.

Formerly Research Manager, Institute of Retail Management, New York University (5 years); Assistant to President and General Merchandise Manager of Snellenberg's Department Store, Philadelphia (3 years).

Special Honors:

Ford Foundation grant to summer research workshop at the University of Chicago.

Conducted Seminar (July 17-20, 1972) in Caracas, Venezuela, on Retail Management for INPRO (Fundacion Instituto Venezolano de Productividad).

Presented a paper entitled "The Marketing Concept and Irrational Behavior of the Retailer," at a faculty-graduate student colloquium at the University of Connecticut, October 19, 1972.

Member of the Committee on Bachelor of Science in Business Administration for the New York Regents External Degree Program.

Books:

Retail Strategy and Structure: A Management Approach. Prentice-Hall, 1969. (Published in Japanese, Spanish and Portuguese). 2nd Edition, Nov. 1974.

Retail Management Cases. Prentice-Hall (Co-Author), 1970.

Retail Strategy-Selections from the Literature. Prentice-Hall, 1970.

Marketing Strategy and Structure. Prentice-Hall, 1974.

Business Today. Random House (Co-Author), January 1976.

Monographs:

Co-author with Dr. H. G. Elam, Electronic Data Processing Systems for Retail Firms, Kingsborough Community College Press.

Commissioned Articles:

"Decision Making Based on Improbable Events in Mass Marketing" co-author, in Readings in Marketing (2nd Edition), Walters, Snider and Sweet, South-Western Publishing Co., Cincinnati, Ohio, 1970.

Have reviewed on the average, two books a year for both the Journal of Marketing and the Journal of Market Research.

"Improving Sales Service, Through Math and Simulation," Retail Overview, September 1968.

APPENDIX H

PUBLICITY

Changing Teacher Ed: More Means to an End

In September 1973 New York State's Education Department directed that all teacher-education programs in the state must become competency-based by 1980. By doing this the state intends to provide a certification system which will ensure that people who become teachers possess, demonstrate and maintain the teaching skills they need to enable children to learn.

Traditional programs of teacher-education have been based on completion of specific course work. If students earn a certain number of education credits, successfully finish a student-teaching experience, and are approved by their sponsoring institution, they receive a five-year New York State teaching certificate.

Instead of being oriented toward specific content, as traditional programs are, competency-basing emphasizes mastery of specific skills, which must be demonstrated before a candidate can be certified to teach.

An example of the difference between traditional and competency-based modes was given by Margaret Charters, assistant professor of home economics, education and consumer studies. She said it is the difference between, on the one hand, receiving a grade of C for taking an accounting course and, on the other, being able to demonstrate knowledge of accounting theory, by performing specific calculations and using specific accounting skills, for example.

Demonstrating Skills

Robert E. Gabrys, lecturer in education, explained one of the major differences between the two approaches this way: "In traditional student-teach-

ing you did your teaching at the end of your training in content areas. You remembered [the content of your courses] and you did it.

"In the new program you don't go into a classroom to see if you have the skills to teach. You've already demonstrated that."

The new program goes a step beyond the traditional kind because it holds students responsible for being competent to teach, according to James F. Collins, assistant dean of education.

Research is currently under way comparing traditional with competency-based modes of teaching preparation in SU's distributive education curriculum. In June 1974 the U.S. Department of Health, Education and Welfare, through its Office of Education, awarded a grant of \$82,420 to SU for the College for Human Development and the School of Education to compare student achievement in the two modes. The project is directed by Charlotte M. Raphaelson, assistant professor of consumer studies, who is in charge of the retailing and distributive education program.

Ms. Charters is the chief researcher. She said the project is an attempt to get empirical data to justify switching from the traditional to the competency-based approach. Research will continue until the end of 1975 and the final report is due in February 1976.

Marketing and Retailing

Distributive education is part of the occupational curriculum in secondary and post-secondary schools, where students take courses in marketing and retailing to prepare for careers in merchandising or related fields. SU's Col-

lege for Human Development prepares people to teach distributive education courses.

Competency-based programs are being developed for certain parts of the distributive education curriculum. The competencies that are stressed reflect the objectives of the newly published state syllabus for distributive education.

A three-hour retailing course was offered in the competency-based mode in fall 1974. A redesigned merchandising course is being given this semester. The retailing sequence has a program in which students work full-time for eight weeks in supervised internships in co-operating Syracuse stores, and next fall this field work will be competency-based.

The first data being analyzed are from the retailing course. Students who took the fall 1974 competency-based course are being compared with those in the traditional spring 1974 course on such criteria as test scores in general content areas and test scores in areas of specific competencies.

A distributive education advisory board was formed to help develop the new SU curriculum and to evaluate the research data comparing the two modes, Ms. Charters said. It consists of students, teachers, high school principals, the Syracuse superintendent of schools, members of the business community, and SU educators and administrators. The state has stipulated that new teacher-education programs must involve appropriate professor personnel in the school districts, as well as college educators.

Continued on page 4

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Changing Teacher Ed: More Means...

Continued from page 1

In restructuring the distributive education curriculum, the advisory board is incorporating the kinds of changes already made in SU's general education courses, Ms. Charters said.

The School of Education began revamping its teacher-training program in spring 1972, according to Collins. He described the new program as a personalized approach, designed to combine an individual's knowledge, skills and capacities into a personalized collection of effective teaching strategies.

All traditional teaching-methods courses have been abolished and have been replaced with two variable-credit courses approved in March by the University Senate. Skills and Knowledge of Teaching (EDU 410/610) offers from 1

to 24 credits. Strategies of Teaching (EDU 420/620), which includes field experience and laboratory options, offers from 1 to 18 credits.

This variable-credit option lets students, assisted by their advisers, select mini-courses which focus on the particular knowledge, skills, and strategies of teaching they need most. With more than 100 mini-courses available, students can choose from such offerings as "Discussing Children's Retention," "Writing Behavior Objectives" and "Teaching by an Inquiry Strategy." Thus, Collins said, the new program affords students more freedom in selecting the means needed to reach their ultimate goal — to function effectively as teachers.

The school's office of education services, under Gabrys' direction, helps students assess their personal career goals and expectations, and plan individualized programs. It acts as liaison with members of the education faculty, who serve as advisers.

Admission to School

The School of Education's admission process includes the completion of Education 300, which involves field-work experience to aid the student in five areas: self-understanding, knowledge of pupils, knowledge of teacher roles, development of career plans and knowledge of the SU teacher-education program.

Course work is combined with practical teaching experience through simulations and short-term observation and practice in local schools. A profile of the student's progress is maintained throughout the program and a student can have access to it any time, Gabrys

In the old program the student received a dose of theory and then a dose of practice, Collins said. Now the school is trying to integrate the two and give the student field-work training all along — combining theory and practice simultaneously. In the three-semester elementary education program, for example, a student gradually reduces the time spent on campus as the time spent in the field increases. The third semester is spent entirely in the field.

"The new program sets higher expectations for student-teachers," Gabrys said, "in that they take full responsibility for a class for an entire semester, rather than just for a few weeks, as was common in traditional programs."

Development of teacher-education centers is another component of the new education curriculum. One has already been set up with Syracuse area school districts and another is to open for the next school year.

Certification

The teacher-certification process has also been revamped. Traditionally the sponsoring institution recommended the candidate for certification. Now, however, a consortium consisting of administrators and faculty from the School of Education, teachers and administrators from the local school districts, and education students enrolled in the program must recommend a candidate for New York State teacher-certification.

The new teacher-education program "does not have to be more difficult for students," Collins said. Rather it is designed to provide "a more dependable base for judging" a student's teaching competency than did the traditional program.

—K.J.B.

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Competency-Based Education Being Tested

By ANITA ALTMAN

A pretty Syracuse University student is showing a customer a man's cardigan. The young newlywed is not sure what size her husband wears and becomes upset by the wide choice of colors and styles.

The salesperson calms her down by asking her how tall her husband is and how much he weighs. Then they discuss his wardrobe and decide quickly on what color sweater would blend with most of his other clothes. She takes the woman's charge card and fills out the sales slip and sends the woman home happy with her decision.

The student's supervisor has been watching. He checks off on his evaluation form that her voice and speech are pleasant, her appearance impressive, her ability to present ideas exceptional, and her adaptation to new situations excellent.

What is unique about this set of circumstances is that the student knows exactly what she is being judged on.

It's part of the competency-based method of teaching in the College for Human Development and School of Education's Cooperative Field Work program in retailing and distributive education.

Research is being done to test its effectiveness by Dr. Margaret Charters, assistant professor and program director for consumer studies and consumer education at the College for Human Development and School of Education. Project director is Charlotte M. Raphaelson, assistant professor of consumer studies and director of the retailing and distributive education programs.

In June 1974 the U.S. Department of Health, Education and Welfare, through its Office of Education, awarded an 18-month grant of \$82,400 to SU for the College for Human Development and School of Education to compare student achievements in competency-based and traditional modes of education.

The two educational methods differ in that in competency-based instruction the students

are required to show proficiency at several points during their study before being allowed to continue to more advanced work.

Students are given statements of exactly what they will be learning and the choices they have in achieving these objectives. They are also provided with information on how they will be evaluated before they start each module.

The object of this type of education is to judge the students on how well they follow through with the goals they set. In this way students are expected to achieve no lower than a B grade. "It really doesn't matter if it takes one person more time to learn something than another person as long as they both learn. And their grade should be the same," remarked Mrs. Raphaelson.

The first competency-based course was offered in the fall of 1974 as a three-hour retailing course. The students were compared with those who took the course in the spring.

This fall's program involves 18 students who completed intensified academic course work in the first seven weeks and now, during the last eight weeks, are working full time in Syracuse retail stores. The students are committed through Dec. 24, and earn six credit hours for the work block. They also must attend a one-night-per-week seminar for one credit hour.

Differing from the required work experience in the last four years, this work block has a more specific training plan which is being carried out by the employer. "Nothing is being hidden from the students," said Mrs. Raphaelson.

A distributive education advisory board was formed to help evaluate the new SU curriculum and the research data comparing the two modes, she added. It consists of high school distributive education teachers, members of the business community, the Syracuse superintendent of schools, high school principals, SU educators, administrators and students.

Cooperating stores in the field work are Dey Brothers, Chappell's, The Addis Company, Sibley's, J.C. Penny, and Casual Corner.



Laura Basile, left, senior retailing major, and Karen Basch, a junior in distributive education, arrange a display at Dey Brothers downtown. They are two of 18 students in the Col-

lege for Human Development's field work program at local stores which is testing the effectiveness of competency-based education.



As required in this new mode of teaching, the students must demonstrate proficiency at several points during their studies before being allowed to continue to more advanced work. Ro-

chelle Phillips, left, senior retailing major, and K. Lee Shuptar, a junior, wait on a customer at Dey Brothers and display their acquired retailing skills.

APPENDIX I

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REFERENCES

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APPENDIX J

BOOKLET
Selected Resources for
Retail Research

SELECTED RESOURCES FOR RETAIL RESEARCH



COLLEGE FOR
HUMAN DEVELOPMENT
SYRACUSE UNIVERSITY

SELECTED RESOURCES
FOR
RETAIL RESEARCH
BY
MARGARET CHARTERS, PH. D.

The resources selected to be included were suggested by Charlotte Raphaelson as those most frequently used in student projects.

The purpose of this booklet is to identify for you and assist you to locate the major library resources you will need to research your project for Retailing 275. This project entails presenting an original design for a store, or a department of a store, justifying and documenting all of your decisions on the basis of research.

Before starting your project, you will be required to find the answers to a series of ten sample research questions from the resources of this booklet.

Funded by FY 1974 under Part C of the
Vocational Education Amendments of 1968.
Project No. V0201V2. Project Director,
Charlotte M. Raphaelson, M.A.; Chief
Researcher, Margaret Charters, Ph.D.;
Graduate Assistant, Ronald Loiacono, M.S.

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Introduction

Information needed for successful retail management is available to anyone who knows where to look!! We hope this booklet will help! Dr. Rowena Wyant, manager of Dun and Bradstreet, Inc. says:

The apparent causes of the business failures of 1974 are primarily heavy operating expenses; inventory difficulties, particularly in manufacturing, but also in wholesaling; a slump in sales; poor location; rise in competition; excessive overhead; shortage of credit, etc. But underlying the failures in an overwhelming nine cases out of ten are the basics: the manager's incompetence, inexperience, ineptitude. Into the balance of 10% may be bunched all the other explanations--including fraud, disaster, neglect,...Even small shops must give serious thought to business statistics to prevent failure. Our government recognized this when it created the Small Business Administration.

LEARN TO USE REFERENCE BOOKS AND INDEXES: THEY CAN MAKE A BIG JOB LITTLE.

(not only for retailing, but for all your academic work)

This booklet will discuss just a few of the ones suggested in your bibliography. We hope you will look for more. There is considerable overlap between sources, but each has its' unique advantage. You will find your own favorite! They will help you discover:

WHO YOUR CUSTOMERS ARE:

re: age, sex, marital status, family income, buying power, etc.

WHAT KIND OF A CITY, TOWN, OR COMMUNITY YOUR BUSINESS IS IN:

re: types of business, industry, schools, banks, transportation, roads, recreation, etc.

HOW YOUR BUSINESS RELATES TO OTHER SIMILAR BUSINESSES:

re: sales, expenses, merchandising, inventory, data, etc.

This booklet should help you to collect this data to help you...

CLARIFY ** ANALYZE ** EVALUATE

the business environment. Here are some sources of data to help you in successful decision making related to a retail business.

Quoted by Sylvia Porter's column, Syracuse Herald Journal 8/19/74

Charlotte Raphaelson
Project Director

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BUSINESS PUBLICATIONS

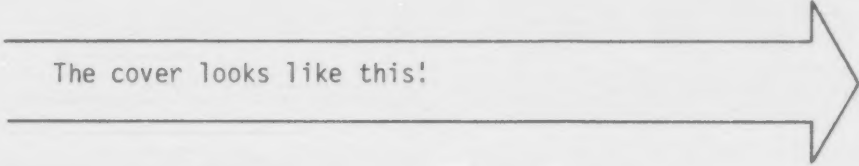
Included are:

- Sales Managements Survey of Buying Power
- Editor and Publisher Market Guide
- Merchandising and Operating Results N.R.M.A.
- Dun and Bradstreet
- Business Index

Sales Management's Survey of Buying Power

This gives population, income, and retail sales estimates for State, County, and Metropolitan areas. The income figure used is called EFFECTIVE BUYING INCOME* which is roughly personal income after taxes, which indicates ability to buy. The division of households by income, and population by age make it easier to aim advertising dollars at key markets.

The Buying Power Index is their most widely used single market measure. It converts three basic elements--population, effective buying income, and retail sales into a measure of the market's ability to buy. It is most useful in estimating the potential for mass products sold at popular prices. (The higher the number, the better!!)



The cover looks like this!

* Specific definitions in center section of the SM's Survey of Buying Power.

HF
5438
A34

A BILL PUBLICATION
s Management
THE MARKETING MAGAZINE
TWENTY-FIVE DOLLARS
MONDAY, JULY 8, 1974

1974
4th floor
**Survey Of
Buying Power**

**Featuring:
Population, Income,
Retail Sales, And
Merchandise Line Sales
Of All U.S. Markets**

Including:

Section A. Features

RIISING BLACK MIDDLE CLASS
COMEBACK OF RURAL AMERICA
LEADING MILITARY MARKETS

**Section B. National &
Regional Summaries,
Market Rankings**

Section C. Metro Market Data by States

Section CS. User's Guide to the Survey

(Center Section) **Definitions • Changes**

Section D. County-City Data by States

Section E. Canada

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The Survey of Buying Power is an annual issue of the periodical, Sales Management, a marketing magazine that is published twice monthly.

REMEMBER!!

"The Survey of Buying Power"
is only one annual issue
of the periodical "SALES MANAGEMENT"

The 1974 "Survey of Buying Power" is in the July 8th issue 1974

The 1973 "Survey of Buying Power" is in the July 23rd issue 1973

Turn the page for a look at the cover
of a recent issue
of
"SALES MANAGEMENT"

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Sales Management

THE MARKETING MAGAZINE

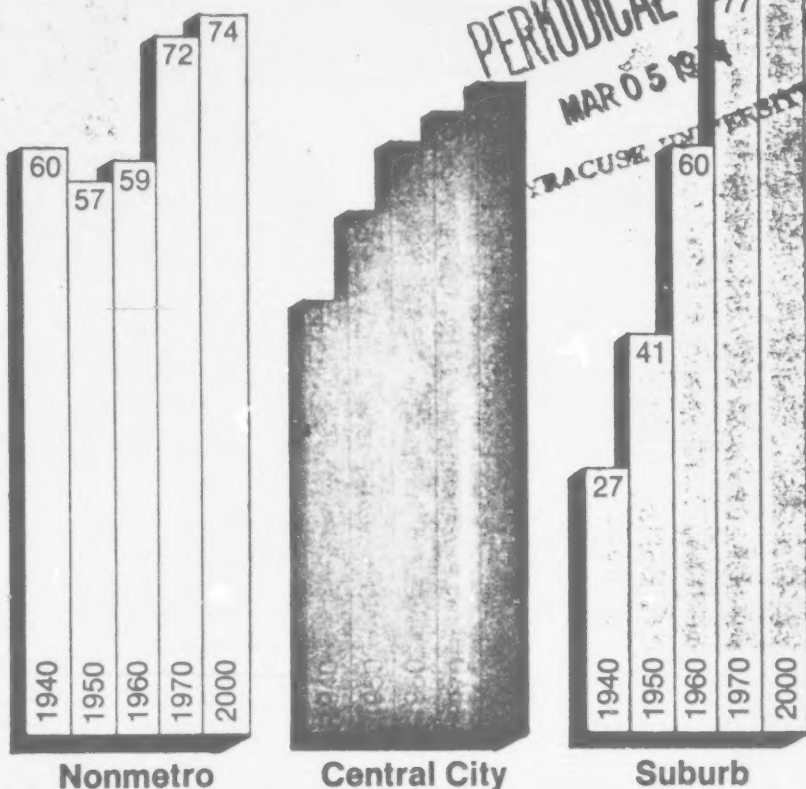
MONDAY, MARCH 4, 1974

ONE DOLLAR

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Maybe You Need A Safety Czar	58
Complete Table of Contents on Page 1	

Guess Where Everybody's Heading

(Population in Millions)



Source: Sales Management est., Census Bureau

Urbanizing Suburbia

The next time you're out in your suburban backyard, scan the horizon for smokestacks. Industry is coming full force into the nation's bedroom communities, and it's likely to effect a permanent change in the landscape.

If current trends continue, most manufacturing employment and retail-wholesale jobs will be in the suburbs by next year, Sales Manage-

ment estimates. The majority of services jobs will be there by the late 1980s.

That shift, combined with a strong tide of population growth, will reshape the suburban market. The energy squeeze, forced with its cut-back in driving, may be giving us a hint of change in a more populous suburban area.

Late Breaks

Service from Eaton. The big auto and truck parts marketer branches into the consumer service arena with a national chain of auto repair centers. Based in St. Louis, the division will be headed by Marsh Penning, formerly general manager of May Co.'s Venture discount stores.

Semi-Brite toothpaste? A bill by Rep. Benjamin Rosenthal (D.-N.Y.) would bar brand names that "mislead the public," and require that the marketer literally justify his superlative. Some prime targets: Ultra-Brite, Hi-C, No-Doz.

Transamerica pitches the bank market with a communications system for foreign exchange trading. Its new TAFEX Systems subsidiary, Stamford, Conn., will set up a computer-based network linking trading rooms across the country. Hardware: Sperry Rand computers, video display terminals, and printers, plus AT&T long lines.

PPG Industries' glass division beefs up its overseas selling. Patrick Gleeson heads a new licensing and export sales department, which brings a number of international marketing functions under one roof.

Plugging along. Sebring Vanguard introduces a \$2,200 electric auto that roves 50 miles (at 30 mph) on batteries that can be recharged in a wall socket. The Sebring, Fla., concern plans to sell 2,000 or more this year.

WHERE TO FIND IT?



Catalog Number
HF
5438
A 34

The 1974 issue of Sales Management's Survey of Buying Power is on the reference shelves on the fourth floor of the Bird Library, located at (A) on the map on the next page, shelved by catalog number.

The 1973 issue is bound in stacks, Volume III, Number 2 on the fourth floor of the Bird Library, located at (B) on the map on the next page, shelved by catalog number.

FOURTH FLOOR

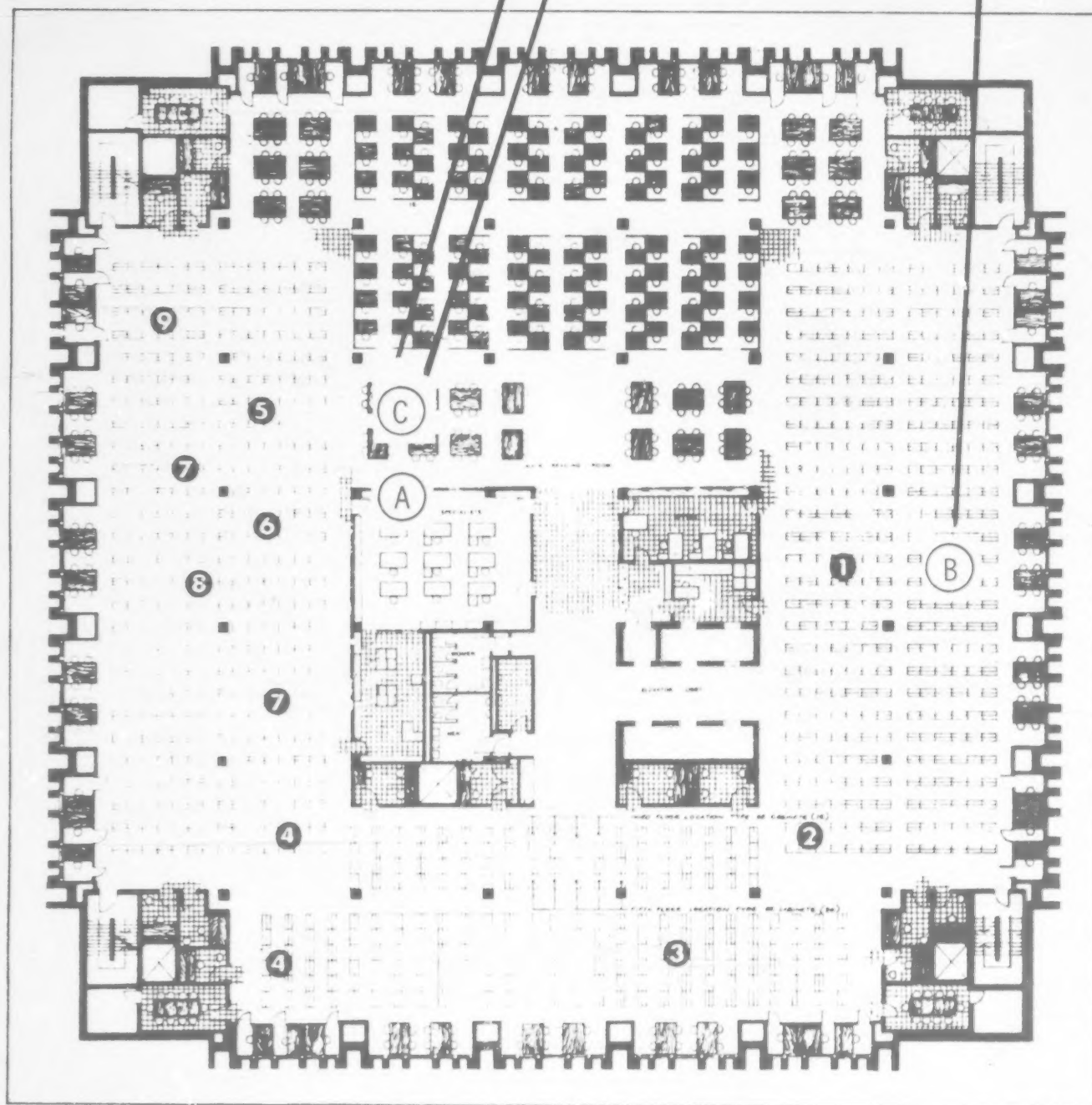
Library of Congress System

1. Business and Economics
2. Sociology
3. Political Science
4. Education

Dewey System

5. Sociology
6. Economics
7. Political Science
8. Business
9. Education

- A. Current issue Sales Management
Survey of Buying Power
Current issue E & P Market Guide
- B. Back issues Sales Management
- C. Dun & Bradstreet Reference
Books



Current issues of Sales Management are on Periodical Shelves in the basement of the Bird Library, shelved in alphabetical order by periodical title.

Back issues of Sales Management are in bound volumes in the stacks on the fourth floor of the Bird Library, located at (B) on the map on page six.

HOW TO USE IT...

Now you have it in your hand (we hope!!)

Turn First to the Center Section

That's right -- in the middle between the two yellow cardboard pages. The pages are numbered CS-1, etc.

Here you will find definitions of terms used in the survey and explanations of any changes in methods of reporting data compared to other years, plus further suggestions for use.

TURN PAGE FOR SAMPLE COLUMNS

SAMPLE TABLES FROM THE SURVEY

SECTION C: Metro Data By States (Population, Income, Retail Sales, Merchandise Line Sales)

		POPULATION - 12/31/73																			
																					
METRO AREA		Total (thou- sands)	% of U.S.	% White	Median Age of Pop.	% of Population by Age Groups								House- holds (thou- sands)	% of Household Heads by Age Groups						
County						0-5 Yrs	6-11 Yrs	12-17 Yrs	18-24 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	65 & Over		Under 25 Yrs	25-34 Yrs	35-44 Yrs	45-54 Yrs	55-64 Yrs	65 & over	
		1	2	3	4	5	6	7	8	9	10	11	12	13		14	15	16	17	18	19

		EFFECTIVE BUYING INCOME - 1973															
METRO AREA		EBI \$000	% of U.S.	Per Capita EBI	Median Hsld EBI	Avg Hsld EBI	% of Hslds by EBI Groups						Buying Power Index	Graded Buying Power indexes			
County							\$0-\$2,999 Hslds	\$3,000-\$4,999 Hslds	\$5,000-\$7,999 Hslds	\$8,000-\$9,999 Hslds	\$10,000-\$14,999 Hslds	\$15,000-\$24,999 Hslds		\$25,000 & Over Hslds	EPP Economy Priced Products	MPP Moderate Priced Products	PPP Premium Priced Products
		20	21	22	23	24	25	26	27	28*	29	30	31	32	33	34	35

RETAIL SALES BY STORE GROUP - 1973															
METRO AREA	County	Total Retail Sales \$000	% of U.S.	Food		Eating & Drinking Places	General Merchandise		Apparel	Furn. House Appl.		Auto-motive	Gas Station	Lumber Bldg. Hdwre	Drug
				Total \$000	Super markets \$000	Total \$000	Total \$000	Dept. Stores \$000	Total \$000	Total \$000	Furn. House Furnishings \$000	Total \$000	Total \$000	Total \$000	Total \$000
		36	37	38	39	40	41	42	43	44	45	46	47	48	49

		RETAIL SALES BY MERCHANDISE LINE—1973													
METRO AREA	Groceries Other Foods		Cosmetics Etc.		Women's Girls Clothing		Men's Boys Clothing		All Footwear		Major Appliances		Furn. Sleep Etc.		
	Mesa Lines	In Food Stores	Mesa Lines	In Drug stores	Mesa Lines	In Dept. Stores	Mesa Lines	In Apparel Stores	Mesa Lines	In Apparel Stores	Mesa Lines	In Appliance Stores	Mesa Lines	In FHE Stores	
	50	51	52	53	54	55	56	57	58	59	60	61	62	63	

SECTION D: County-City Data By States (Population, Income, Retail Sales)

		POPULATION 12/31/73					EBI 1973					RETAIL SALES - 1973									
COUNTIES CITIES	Met. Area Code	Total (thou-lands)	% of U.S.	House-holds (thou-lands)	Net Dollars \$000	Median Hsld EBI	% Hslds by EBI Group					Total Retail Sales \$000	% of U.S.	Food \$000	General Mese \$000	Furn. House Appl. \$000	Auto-motive \$000	Drug \$000	Buying Power Index		
							A	B	C	D	E										
		64	65	66	67	68						69	70	71	72	73	74	75	76	77	78

II.

Editor and Publisher Market Guide

Compiles market information for every city or community in the U.S. and Canada where a daily newspaper is published.

Reference Shelf
Fourth Floor

HF 5905 E 38 1974

Location (A)
See map on page
10.

RANKS cities, counties, and SMSA* in order of income, population, total retail sales, and food sales.

* A Standard Metropolitan Statistical Area is an integrated economic and social unit with a large population nucleus (p. 572 E&P Market Guide also gives complete list of all U.S. SMSAs) e.g. Syracuse SMSA includes all of Onondaga, Madison, and Oswego counties.

ONEIDA, N. Y.

1—LOCATION: Madison County, E&P Map D-3. Geographical center of State. On State Hwy. 8, 46, 365; 263 mi. from NYC; 26 mi. E. of Syracuse; 22 mi. W. of Utica. On NY 8 Thruway.

2—TRANSPORTATION: Railroads—Penn-Central; West Shore (freight only).
Motor Freight Carriers—3.
Motorcity Bus Lines—Central N. Y.

3—POPULATION: Corp. City 70 Cen. 11,658; Loc. Est. 11,700
City Zone 12,650
Retail Trading Zone, Local Est. 51,000
County 70 Cen. 62,864; Loc. Est. 64,700
City & Retail Trading Area, Local Est. 63,900



Oneida Dispatch (e ex. sat.) 10,390; (sat. m) 10,390 sworn 3/31/72

4—HOUSEHOLDS: 70 Census: City 3,848; County 17,741

5—BANKS: Number Deposits
Commercial Banks 2 \$45,000,000
Savings Banks 1 \$42,000,000
Sav. & Loan Assn. 1 \$17,000,000

6—PASSENGER AUTOS: County 23,745

7—ELECTRIC METERS: Residence 12,500

8—GAS METERS: Residence 7,420

9—PRINCIPAL INDUSTRIES: (CZ)—Industry, Number of Wage Earners, Salesmen 3,500
Bottle Caps 100; Woodworking 175; Food Prod. 190; Milling Mach 110.
Principal Industrial Pay Days—Fri.

11—TAP WATER: Alkaline, very soft.

12—RETAILING: Principal Shopping Center—4 blocks on Main St.; 2 on Madison St.; 1 on Lenox Ave.; Parlier Ave. & Phelps St. on Broad St.; 4 New Shop. Ctrs.
Principal Shopping Days: Thurs., Fri., Sat.

13—

YOU CAN FIND . . .

Individual Market Surveys

PLUS

Combines census, and E&P 1974 estimates for population, income, no. households, income household, no. farms, value crops and livestock. (terms defined p. 22.)

PLUS

Retail sales census and estimates tabulations for 9 categories of retail business.

ILLINOIS RETAIL SALES—CENSUS & ESTIMATES

	1967			E&P 1972			E&P 1973			NUMBER OF STORES and 1973 ESTIMATE OF SALES (\$1,000)											
	U.S. Census (\$1,000)	Estimate (\$1,000)	Estimate (\$1,000)				Lib. Hdw.	Gen. Mktg.	Food	Auto	Gasoline	Apparel	Furniture	Est. Drink	Drugs						
STATE TOTALS	19,252,590	24,912,593	26,048,084	5,830	1,951,655	3,101	3,594,137	12,586	5,446,373	4,420	4,338,431	9,616	1,705,611	6,240	1,568,093	4,822	1,239,410	21,544	2,151,600	2,808	1,002,440
STANDARD METROPOLITAN STATISTICAL AREAS																					
Washington-National	186,195	282,164	277,432	75	27,039	33	43,101	97	47,643	58	41,732	120	31,905	42	10,361	40	11,549	172	20,061	23	9,864
Chicago-Urbana	256,589	755,390	375,148	85	29,926	37	61,515	85	74,623	66	68,154	137	25,743	83	14,858	78	16,408	222	28,936	28	12,101
Chicago	12,464,515	16,149,190	16,036,138	1,925	216,797	1,612	2,719,534	7,407	3,555,086	1,665	2,704,881	4,389	958,454	4,092	1,184,145	2,561	776,938	12,790	1,480,862	1,850	717,291
Downport-Rock Island																					
Madison, La. 4th	639,701	652,324	884,928	182	64,110	105	127,045	338	181,717	187	163,664	382	67,302	149	32,473	164	41,070	726	79,165	85	34,142
Peoria	725,132	758,170	300,778	67	16,414	29	51,250	93	60,292	88	67,241	129	20,254	40	14,641	58	15,755	189	21,143	19	10,716
Peoria	622,276	978,180	827,471	107	73,081	85	131,915	338	195,510	180	170,154	385	66,437	144	32,557	168	48,438	680	65,261	74	24,334
Rockford	475,947	662,872	700,241	123	52,085	71	87,566	231	148,184	123	129,403	350	12,095	125	30,578	113	47,237	437	59,521	84	N.A.
St. Louis, Mo. 4th	2,685,836	4,104,441	3,806,610	711	898,100	2,984	1,194,477	1,144	409,766	999	329,177	1,144	409,766	999	329,177	1,144	409,766	999	329,177	1,144	409,766
Springfield																					

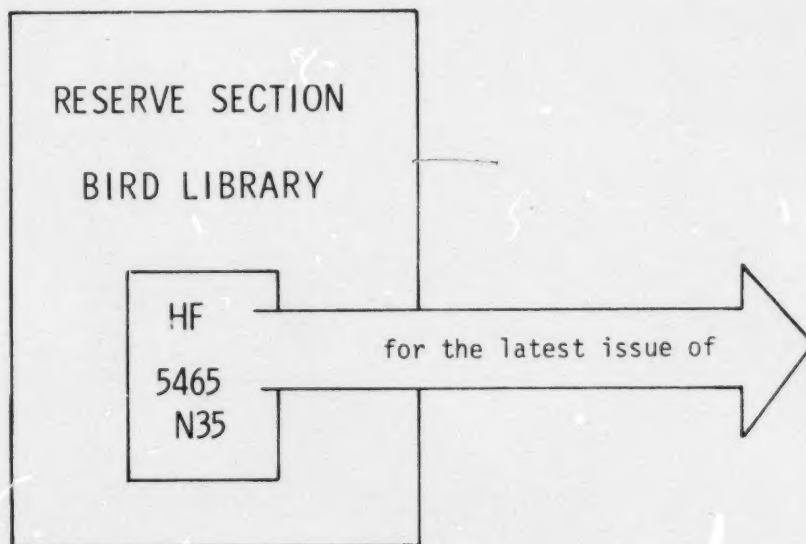
III.

Merchandising and Operating Results

Planning a store?

or want to know how others are doing?

Go to



HF
5465
U4
N35
1971

MARK

Merchandising and Operating Results of 1971

Financial Executives Division
National Retail Merchants Association

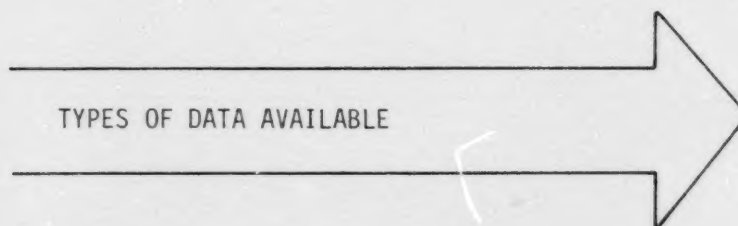
To use MOR effectively,

YOU NEED TO KNOW THAT: median performance in any category is the performance at the MID-POINT of the distribution when items are ordered from high to low.

You also need to know that MOR goal performance figures are set at the point where only 25% of the companies in the sample have a higher performance level

or

only 25% of the companies have a lower performance level in an area such as costs where low performance is a goal.



Departmental Merchandising and Operating Results of 1971

Department Stores Sales Over \$1 Million

DEPT. NO. DEPARTMENT CENTER	DESCRIPTION	NO. RPTG. COS.	MERCHANDISING AND INVENTORY DATA					
			CUMULATIVE MARKON %		MARKDOWNS (INCL. EMPLOYEE DISCOUNTS)		STOCK SHORTAGE	
					PERCENT OF NET RETAIL SALES			
			MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL
	UPSTAIRS DEPARTMENTS							
1000	ADULT FEMALE APPAREL	123	46.1	47.1	15.2	12.7	1.8	1.0
1100	DRESSY & TAILORED COATS	77	46.0	47.0	16.9	13.3	.7	.1
1110	WOMENS & MISSES DRESSY & TAILORED COATS	52	46.0	47.1	17.2	12.8	1.6	.2

DEPT. NO. DEPT. AND CENTER DEPT. AND CENTER	MERCHANDISING AND INVENTORY DATA											
	NET WORK ROOM COST		GROSS MARGIN (INCL. CASH DISCOUNTS)		GROSS MARGIN \$ RETURN PER \$ AVERAGE COST INVENTORY		CASH DISCOUNTS % OF COST PURCHASES		STOCK TURNS (TIMES) AT RETAIL		STOCK AGE % 0 - 6 MONTHS	
	PERCENT OF NET RETAIL SALES											
	MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL
1000	.4	.2	40.9	42.4	3.32	4.04	7.8	8.0	4.4	5.2	90.1	96.6
1100	.8	.4	40.0	42.1	3.16	3.92	7.8	8.0	4.2	5.2	88.4	100.0
1110	.8	.4	39.6	42.4	3.05	3.65	8.0	8.4	4.2	5.0	95.9	100.0

SALES DATA				EXPENSES				SALES DATA					
RETURNS % GROSS SALES		\$ SALES PER SQ. FT. OF SELLING SPACE (MAIN OR LARGEST SELLING UNIT)		SALES PROMOTION COSTS (NET) % OF SALES		SELLING SALARIES % OF SALES (MAIN OR LARGEST SELLING UNIT)		NET SALES % CHANGE FROM LAST YEAR		NET SALES % OF TOTAL CON- SOLIDATED STORE		NET SALES % OF MOR MERCHAN- DISE DIVISION	
DEPT.	GOAL	MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL	MEDIAN	GOAL
111	3.4	87	105	2.7	2.1	7.7	6.4	6.7	12.9	18.5	24.2	100.0	100.
011	8.4	88	132	3.1	2.3	7.8	6.0	7.7	17.8	2.4	4.5	13.4	19.
211	5.8	114	129	3.0	1.9		4	5.0	18.3	1.5	2.4	9.3	14.

The MOR will give you information for
specific departments within:

Department and Specialty stores under \$1 million

All Department stores - over \$1 million

All Department stores - \$1 - 10 million

All Department stores - \$10 - 50 million

All Department stores - over \$50 million

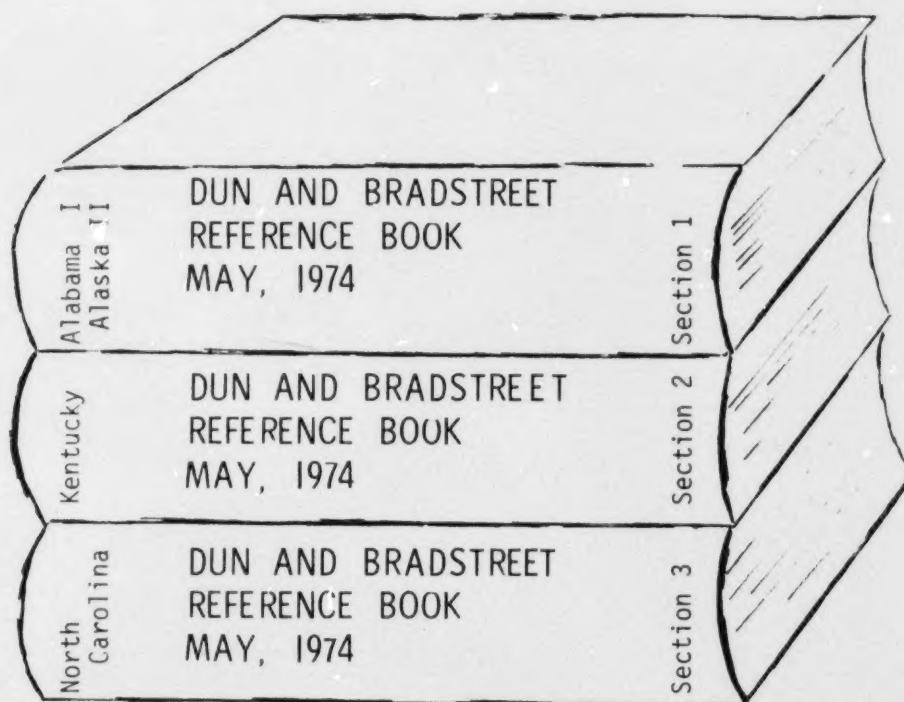
All Specialty stores - over \$1 million

All Specialty stores - \$1 - 5 million

All Specialty stores - \$5 - 50 million

IV.

Dun and Bradstreet Reference Books



Probably the most widely known and often used business reports and references are put out by the credit reporting agency.

Dun and Bradstreet, Inc.

99 Church Street

New York, New York 10007

2nd Carrel on the fourth floor of the Bird Library,

Ⓒ on the map. Restricted use. Available only in large libraries. No back issues.

The handsome dark blue with gold printing three volume set of

DUN and BRADSTREET REFERENCE BOOKS

HF 5573 D7

are the ones of interest to you to:

- set up credit lines based on ratings
- locate sources of supply and verify their credit standing and stability
- build prospect files
- revise sales potential estimates
- set sales objectives

THE NEXT THREE PAGES GIVE YOU AN EXPLAN-
ATION OF THE DUN and BRADSTREET LISTINGS,
KEYS TO RATINGS, AND A COPY OF THE LIST-
ING FOR THE TOWN OF ONEIDA, N.Y., TO
CONTRAST WITH THE FORMAT OF THE E&P MAR-
KET GUIDE LISTING FOR THE SAME TOWN, SHOWN
ON PAGE 15 OF THIS BOOKLET.

Name of City, Town or Village

Directly under each town are the bank listings for that town, with names of principal bank officers.

Business name used for buying

Standard Industrial Classification code for line of business. For explanation of the code, see pages VII through XII.

"A" indicates an additional name, and "C" a change in rating since the previous revision. The Reference Book is revised every two months. The "A" and "C" in this position are not to be confused with the Estimated Financial Strength symbols in the rating column to the right of the listing.

When a capital and credit rating is followed by the explanation "Suby of . . ." it indicates that the parent corporation has adopted a resolution guaranteeing the contract obligations of the subsidiary. In these situations the capital and credit rating will be the same as the one assigned to the parent corporation.

Branch listing. Where the branch and headquarters are in the same state, no rating is given for the branch. In these listings the legend "Br of" is shown directly below the listing with the headquarters town where rating will be found, i.e., "Br of Johnstown."

Where the branch and headquarters are in different states, a rating is shown at the branch. Because closing dates for the states are not all the same, subscribers should take into consideration that a branch rating may not always correspond with its headquarters rating.

When the symbol * follows a name, it indicates that the business is a corporation and "Corporation", "Corp.", "Incorporated", "Inc.", "Limited", or "Ltd." has been omitted.

CRESTVIEW, 4,250 Field 49									
EATON TR CO								\$211M	
R D Williams Pr C E Morris Cas									
LAUREL NAT BK								\$147M	
J Roscoe Elliot Pr I Lewis Cas									
25 12 Jones A F & Co				WdFrn	BA1				
A 52 11 Keeton Lumber Corp				BldMtl 4	EE2				
23 52 Lake Hat Co				Hats 8	Inv				
C 53 99 Lane Bros Inc				GehMds 9	DD2				
56 21 Paris Fashions of									
Crestview, Inc.				WnWr	3A1				
Suby of Paris Fashions, Inc.									
Longview, Va.									
54x11 Russell A F				Cr					
55 41 Thomas Bros				SvSta					
Br of Johnstown									
12 11 Wells Coal Co*				Min	1A2				
Br of Pittsburgh Pa									
23 21 Wilson John & Co*				Cl	CB1				
50-42 Zindler & Dahl				Toy	BB1				
59 12 Zoby John R*				Drg	2				
DANFIELD (See Carterville)									

Population. These are the official statistics of 1970 census issued by the United States Government. Absence of a number in this position indicates that according to the 1970 U.S. census either the town or village had less than 1,000 inhabitants, or it is an unincorporated community without natural or defined boundaries, that merges into other unincorporated communities and in these instances "census" takes the position that no fair division of the combined population can be determined.

Canadian population statistics are the latest available but vary as to year in the different provinces. Those for incorporated towns are government statistics; for other towns local estimates are used generally for the same year as the latest census.

Name of County or Parish, if any.

Code number of Dun & Bradstreet reporting office. See page headings in Reference Book for corresponding names of offices.

Numbers in the rating column following the bank name indicate approximately, in thousands, the combined totals of Capital Stock, Capital Debentures, Capital Reserves, Surplus and Undivided Profits. On Canadian banks these numbers are omitted.

Ratings always appear at the extreme right end of the line. In this example, BA1 means Estimated Financial Strength \$300,000 to \$500,000; Compos Credit Appraisal, High. The full Rating Key appears on front and back inside covers.

A numeral immediately preceding the rating mark the year when the business was established or came under present control or management. Thus 8 means 1968, 9 means 1969. Absence of a numeral in this position indicates that the business was established prior to ten years ago. This feature is not used in listings of branch locations.

Line of Business. See Abbreviations, pages V & VI.

Heading used for all non-post office towns. Businesses in a non-post office town are listed under the post office town which serves it—in this case under Carterville.

Explanation and Use of Listings

Key to Ratings

ESTIMATED FINANCIAL STRENGTH			COMPOSITE CREDIT APPRAISAL			
			HIGH	GOOD	FAIR	LIMITED
5A	Over	\$50,000,000	1	2	3	4
4A	\$10,000,000 to	50,000,000	1	2	3	4
3A	1,000,000 to	10,000,000	1	2	3	4
2A	750,000 to	1,000,000	1	2	3	4
1A	500,000 to	750,000	1	2	3	4
BA	300,000 to	500,000	1	2	3	4
BB	200,000 to	300,000	1	2	3	4
CB	125,000 to	200,000	1	2	3	4
CC	75,000 to	125,000	1	2	3	4
DC	50,000 to	75,000	1	2	3	4
DD	35,000 to	50,000	1	2	3	4
EE	20,000 to	35,000	1	2	3	4
FF	10,000 to	20,000	1	2	3	4
GG	5,000 to	10,000	1	2	3	4
HH	Up to	5,000	1	2	3	4

CLASSIFICATION FOR BOTH ESTIMATED FINANCIAL STRENGTH AND CREDIT APPRAISAL

FINANCIAL STRENGTH BRACKET

- 1 \$125,000 and Over
2 20,000 to 125,000

EXPLANATION

When only the numeral (1 or 2) appears, it is an indication that the estimated financial strength, while not definitely classified, is presumed to be within the range of the (\$) figures in the corresponding bracket and that a condition is believed to exist which warrants credit in keeping with that assumption.

"INV." shown in place of a rating indicates that the report was under investigation at the time of going to press. It has no other significance.

Absence of a Listing

The absence of a listing is not to be construed as meaning a concern is non-existent, has discontinued business, nor does it have any other meaning. The letters "NQ" on any written report mean "not listed in the Reference Book".

Year Business Started

The numeral shown is the last digit of the year date when the business was established or came under present control or management. Thus, 8 means 1968, 9 means 1969. No dates go past ten years. Thus the absence of a numeral indicates ten years or more. This feature is not used in connection with branch listings.

ABSENCE OF RATING DESIGNATION FOLLOWING NAMES LISTED IN THE REFERENCE BOOK

The absence of a rating, expressed by two hyphens (--), is not to be construed as unfavorable but signifies circumstances difficult to classify within condensed rating symbols. It suggests the advisability of obtaining a report for additional information.

EMPLOYEE RANGE DESIGNATIONS IN REPORTS OR NAMES NOT LISTED IN THE REFERENCE BOOK

Certain businesses do not lend themselves to a Dun & Bradstreet rating and are not listed in the Reference Book. Information on these names, however, continues to be stored and updated in the D&B Business Data Bank. Reports are available on these businesses but instead of a rating they carry an Employee Range Designation (ER) which is indicative of size in terms of number of employees. No other significance should be attached.

KEY TO EMPLOYEE RANGE DESIGNATIONS

ER 1	Over 1000 Employees
ER 2	500 - 999 Employees
ER 3	100 - 499 Employees
ER 4	50 - 99 Employees
ER 5	20 - 49 Employees
ER 6	10 - 19 Employees
ER 7	5 - 9 Employees
ER 8	1 - 4 Employees
ER N	Not Available

Keys to Ratings

1. NEW YORK, N.Y. 10008/Box 801 Church St. Ste 1212/1982-6300
2. NEW YORK, N.Y. 11744/Box 851/1516293 1600
4. BUFFALO, N.Y. 14240/Box 992/17161802 9930
4. ALBANY, N.Y. 12208/Box 8540/15161802 9930
5. ROCHESTER, N.Y. 14603/Box 1450/17161442 8110

55	11	Stretcher Robert	SvStn 1	EE2	17	11	Con Kenneth W	Eic 0	HH2	59	1	Medical Center Pharmacy	Org Trnst	BB1	57	27	Williams Oneida Sewing	Appl RptSv 5	EE2
56	11	Stretcher Robert	SvStn 1	EE2	58	11	Con Kenneth W	Eic 0	HH2	60	1	Medical Center Pharmacy	Org Trnst	BB1	76	99	Williams Oneida Sewing	Appl RptSv 5	EE2
57	11	Stretcher Robert	SvStn 1	EE2	59	11	Con Kenneth W	Eic 0	HH2	61	1	Medical Center Pharmacy	Org Trnst	BB1	77	99	Williams Oneida Sewing	Appl RptSv 5	EE2
58	11	Stretcher Robert	SvStn 1	EE2	60	11	Con Kenneth W	Eic 0	HH2	62	1	Medical Center Pharmacy	Org Trnst	BB1	78	99	Williams Oneida Sewing	Appl RptSv 5	EE2
59	11	Stretcher Robert	SvStn 1	EE2	61	11	Con Kenneth W	Eic 0	HH2	63	1	Medical Center Pharmacy	Org Trnst	BB1	79	99	Williams Oneida Sewing	Appl RptSv 5	EE2
60	11	Stretcher Robert	SvStn 1	EE2	62	11	Con Kenneth W	Eic 0	HH2	64	1	Medical Center Pharmacy	Org Trnst	BB1	80	99	Williams Oneida Sewing	Appl RptSv 5	EE2
61	11	Stretcher Robert	SvStn 1	EE2	63	11	Con Kenneth W	Eic 0	HH2	65	1	Medical Center Pharmacy	Org Trnst	BB1	81	99	Williams Oneida Sewing	Appl RptSv 5	EE2
62	11	Stretcher Robert	SvStn 1	EE2	64	11	Con Kenneth W	Eic 0	HH2	66	1	Medical Center Pharmacy	Org Trnst	BB1	82	99	Williams Oneida Sewing	Appl RptSv 5	EE2
63	11	Stretcher Robert	SvStn 1	EE2	65	11	Con Kenneth W	Eic 0	HH2	67	1	Medical Center Pharmacy	Org Trnst	BB1	83	99	Williams Oneida Sewing	Appl RptSv 5	EE2
64	11	Stretcher Robert	SvStn 1	EE2	66	11	Con Kenneth W	Eic 0	HH2	68	1	Medical Center Pharmacy	Org Trnst	BB1	84	99	Williams Oneida Sewing	Appl RptSv 5	EE2
65	11	Stretcher Robert	SvStn 1	EE2	67	11	Con Kenneth W	Eic 0	HH2	69	1	Medical Center Pharmacy	Org Trnst	BB1	85	99	Williams Oneida Sewing	Appl RptSv 5	EE2
66	11	Stretcher Robert	SvStn 1	EE2	68	11	Con Kenneth W	Eic 0	HH2	70	1	Medical Center Pharmacy	Org Trnst	BB1	86	99	Williams Oneida Sewing	Appl RptSv 5	EE2
67	11	Stretcher Robert	SvStn 1	EE2	69	11	Con Kenneth W	Eic 0	HH2	71	1	Medical Center Pharmacy	Org Trnst	BB1	87	99	Williams Oneida Sewing	Appl RptSv 5	EE2
68	11	Stretcher Robert	SvStn 1	EE2	70	11	Con Kenneth W	Eic 0	HH2	72	1	Medical Center Pharmacy	Org Trnst	BB1	88	99	Williams Oneida Sewing	Appl RptSv 5	EE2
69	11	Stretcher Robert	SvStn 1	EE2	71	11	Con Kenneth W	Eic 0	HH2	73	1	Medical Center Pharmacy	Org Trnst	BB1	89	99	Williams Oneida Sewing	Appl RptSv 5	EE2
70	11	Stretcher Robert	SvStn 1	EE2	72	11	Con Kenneth W	Eic 0	HH2	74	1	Medical Center Pharmacy	Org Trnst	BB1	90	99	Williams Oneida Sewing	Appl RptSv 5	EE2
71	11	Stretcher Robert	SvStn 1	EE2	73	11	Con Kenneth W	Eic 0	HH2	75	1	Medical Center Pharmacy	Org Trnst	BB1	91	99	Williams Oneida Sewing	Appl RptSv 5	EE2
72	11	Stretcher Robert	SvStn 1	EE2	74	11	Con Kenneth W	Eic 0	HH2	76	1	Medical Center Pharmacy	Org Trnst	BB1	92	99	Williams Oneida Sewing	Appl RptSv 5	EE2
73	11	Stretcher Robert	SvStn 1	EE2	75	11	Con Kenneth W	Eic 0	HH2	77	1	Medical Center Pharmacy	Org Trnst	BB1	93	99	Williams Oneida Sewing	Appl RptSv 5	EE2
74	11	Stretcher Robert	SvStn 1	EE2	76	11	Con Kenneth W	Eic 0	HH2	78	1	Medical Center Pharmacy	Org Trnst	BB1	94	99	Williams Oneida Sewing	Appl RptSv 5	EE2
75	11	Stretcher Robert	SvStn 1	EE2	77	11	Con Kenneth W	Eic 0	HH2	79	1	Medical Center Pharmacy	Org Trnst	BB1	95	99	Williams Oneida Sewing	Appl RptSv 5	EE2
76	11	Stretcher Robert	SvStn 1	EE2	78	11	Con Kenneth W	Eic 0	HH2	80	1	Medical Center Pharmacy	Org Trnst	BB1	96	99	Williams Oneida Sewing	Appl RptSv 5	EE2
77	11	Stretcher Robert	SvStn 1	EE2	79	11	Con Kenneth W	Eic 0	HH2	81	1	Medical Center Pharmacy	Org Trnst	BB1	97	99	Williams Oneida Sewing	Appl RptSv 5	EE2
78	11	Stretcher Robert	SvStn 1	EE2	80	11	Con Kenneth W	Eic 0	HH2	82	1	Medical Center Pharmacy	Org Trnst	BB1	98	99	Williams Oneida Sewing	Appl RptSv 5	EE2
79	11	Stretcher Robert	SvStn 1	EE2	81	11	Con Kenneth W	Eic 0	HH2	83	1	Medical Center Pharmacy	Org Trnst	BB1	99	99	Williams Oneida Sewing	Appl RptSv 5	EE2
80	11	Stretcher Robert	SvStn 1	EE2	82	11	Con Kenneth W	Eic 0	HH2	84	1	Medical Center Pharmacy	Org Trnst	BB1					

V. Business Index

HOW TO LOCATE A PERIODICAL ARTICLE IN 3 EASY STEPS
Mrs. B. Henderson Bird Library Business Bibliographer

STEP 1. Find the ARTICLE OR SUBJECT you want.

Use general or specific indexes as Business Periodicals Index as an example.

TOY Industry

Consumer research: tomorrow's toyland: how to picture it today. D.A. Schwartz. il Sales Mgt 110:42 + Mr 19'73

This article would be found in Sales Management, Volume 110 page 42 - in the March 19, 1973 issue. The Volume number always precedes the colon (:). This article is illustrated as shown by "il".

STEP 2. Find its CALL NUMBER or CLASSIFICATION NUMBER.

This is the number found on the back of the book and is used by the library to place the book in its proper classification according to its subject. You must have it in order to locate the book or periodical. Check the current Periodicals Print Out or check in the Card Catalogue for this. The Print Outs will be found on all the Information Desks in the library.

Find the Title of the periodical or magazine (not article) in the alphabetical arrangement. At the right you will find the call number. In this case it will look like this: SALES MANAGEMENT HF 5438.A34

STEP 3. Find the actual LOCATION.

Now that you know the call number of the periodical, next question is, "Where will I find the volume which contains the article that I want?" Look for a sheet which is also kept at the Information Desks, called LOCATION OF MATERIALS. On examination, you will note there are two columns: one beginning with numbers and the other beginning with letters:

000-299.....3 fl. Bird A-AZ.....Basement Bird

Note: Current periodicals in most cases, are in the Basement.

GOVERNMENT PUBLICATIONS

Included are:

- Census of Population
- Census of Business
- Directory of Federal Statistics for Local Areas
- Statistical Abstract
- County Business Patterns
- Current Business Reports

A UNITED STATES
DEPARTMENT OF
COMMERCE
PUBLICATION



CHARACTERISTICS
OF THE POPULATION

volume I

part 34 | **NEW YORK** section 1

**1970
CENSUS OF
POPULATION**

U.S. DEPARTMENT
OF COMMERCE
Social and Economic
Statistics Administration

BUREAU OF
THE CENSUS

- 28 -
300

VI.

Census of Population

Ref
HA
201
1970
A 456

Located on the first floor Reference Shelves (A)

on the Bird Library map, page 35.

Shelves of pale volumes with blue printing

"Characteristics of Population".

Another shelf of "Special Reports" such as:

Occupational Characteristics; Low Income
Population; Veterans, etc.

Look at the "Contents" to locate data on pop-
ulation by age; race; sex; household; and
family characteristics for any location.

A bonus is information by census tracts.

A UNITED STATES
DEPARTMENT OF
COMMERCE
PUBLICATION



1967 CENSUS OF BUSINESS

7503
1-701

Vol. I



RETAIL TRADE
SUBJECT REPORTS

U.S. DEPARTMENT
OF COMMERCE

Bureau of
the Census

302

VII.

Census of Business

Ref
HF
3007
A5
1967

- Vol. I - Retail Trade Subject Reports
- Vol. II - Retail Trade Area Statistics
- Vol. III - Wholesale Trade Subject Reports
- Vol. IV - Wholesale Trade Area Statistics
- Vol. V - Selected Service Area Statistics

Pale green volumes printed in dark green; located on the First Floor Reference Shelves (A) on the Bird Library Map.

1972 Census Materials still being received by the library. Only some pieces are available and generally the material is for small states, i.e. Wyoming, Utah, Nevada, etc. coming in all the time.

All the information in the Business Census is collected from this questionnaire, example of which are on the following three pages.

RETAIL TRADE GENERAL QUESTIONS

PENALTY FOR FAILURE TO REPORT

Form approved: Budget Bureau No. 41-867017

U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS 1967 CENSUS OF BUSINESS		NOTICE: Response to this inquiry is required by law (Title 13 U.S. Code). By the same law, your report to the Census Bureau is confidential. It may be seen only by sworn Census employees and may be used only for statistical purposes. The law also provides that copies retained in your files are immune from legal process. In correspondence pertaining to this report, please refer to this Census File Number 2 Employer Identification No. 2																																	
1. NAME AND PHYSICAL LOCATION a. Is the name shown in the label the name by which this establishment is known to the public? ☐ Yes ☐ No (If "No," enter trade name above the label.) b. Is the address in the label— 1. ☐ The mail address of your establishment but not the actual physical location. 2. ☐ The mail address of your establishment including number and street which also is its actual physical location. 3. ☐ Neither of the above (e.g., accountant's office). (NOTE: If you marked box 1 or 3, no number and street are not shown in the label; complete c, d, and e below. If you marked box 2, complete d and e below.) c. Enter following physical location information: <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Number and street</td> <td style="width: 50%;">City, village, or other place</td> </tr> <tr> <td>State</td> <td>ZIP code</td> </tr> </table> (NOTE: If location cannot be described by number and street, give name or number of highway and approximate distance from nearest town.) d. Enter name of county in which your establishment is located. e. Is your establishment physically located within the boundaries of the city, village, or other place specified in the label or in "c"? 1. ☐ Yes 2. ☐ No		Number and street	City, village, or other place	State	ZIP code	2. EMPLOYER IDENTIFICATION NUMBER Is the Employer Identification (EI) Number printed in the address label the SAME as that used for this establishment on your latest 1967 Employer's Quarterly Federal Tax Return, Treasury Form 941? ☐ Yes ☐ No (If "No," enter the currently assigned EI Number here (9 digits)) 3. LEGAL FORM OF ORGANIZATION OF COMPANY OPERATING THIS ESTABLISHMENT X 1 1. ☐ Individual proprietor 2. ☐ Partnership 3. ☐ Corporation (Do not mark if any form of cooperative association) 4. ☐ Coop. cooperative association, corporate or non-corporate 5. ☐ Other (Specify) 4. PERIOD OPERATED IN 1967 X 2 a. Was this establishment in business at the end of 1967? 1 ☐ Yes 2 ☐ No (NOTE: For establishments which were inactive during December 1967 due to seasonal or part-time operations, answer "Yes," unless the establishment was not owned at the end of the year.) b. How many months during 1967 did you own this establishment? Months X 3 5. CLASS OF CUSTOMER X 4 Report the approximate percentage of your total 1967 sales to each class of customer. <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">1. ☐ % General public (household consumers, farmers, and individuals)</td> <td style="width: 50%; text-align: center;">XX</td> </tr> <tr> <td>2. ☐ % Construction and building trade contractors</td> <td style="text-align: center;">XX</td> </tr> <tr> <td>3. ☐ % Other business firms, government, and institutions</td> <td style="text-align: center;">XX</td> </tr> <tr> <td>4. ☐ % Other (Specify)</td> <td style="text-align: center;">XX</td> </tr> </table> 6. METHOD OF SELLING X 5 Mark the box which describes your principal method of selling. Do not mark more than one box. 1. ☐ Selling at this establishment 2. ☐ Mail order (catalog selling) 3. ☐ House-to-house (direct selling) 4. ☐ Operating merchandise vending machines 7. DOLLAR VOLUME OF BUSINESS AND PAYROLL IN 1967 <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th></th> <th>Dollars</th> <th>Cents</th> <th>Key</th> </tr> <tr> <td>a. Sales of merchandise and other receipts from customers</td> <td style="text-align: center;">XX</td> <td style="text-align: center;">XX</td> <td style="text-align: center;">X 6</td> </tr> <tr> <td>b. Does the entry in "a" include sales taxes and excise taxes collected from customers?</td> <td style="text-align: center;">1 ☐ Yes 2 ☐ No</td> <td></td> <td style="text-align: center;">X 7</td> </tr> <tr> <td>c. If "No," how much did you forward to taxing agencies for such taxes?</td> <td style="text-align: center;">Dollars</td> <td style="text-align: center;">Cents</td> <td style="text-align: center;">XX X 8</td> </tr> <tr> <td>d. Total ANNUAL payroll in 1967 before deductions</td> <td style="text-align: center;">XX</td> <td style="text-align: center;">XX</td> <td style="text-align: center;">X 9</td> </tr> </table> 8. COMPANY AFFILIATION X 10 a. Mark this box ☐ if this business is owned or controlled by another company and enter the name, mailing address, and Employer Identification Number of owning or controlling company (if known). b. Mark this box ☐ if this business owns or controls any other company or companies and enter the name, mailing address, and Employer Identification Number of owned or controlled companies (if known). Name of company: _____ Mailing address (Number, street, city, State, ZIP code): _____ EI No. (9 digits): _____		1. ☐ % General public (household consumers, farmers, and individuals)	XX	2. ☐ % Construction and building trade contractors	XX	3. ☐ % Other business firms, government, and institutions	XX	4. ☐ % Other (Specify)	XX		Dollars	Cents	Key	a. Sales of merchandise and other receipts from customers	XX	XX	X 6	b. Does the entry in "a" include sales taxes and excise taxes collected from customers?	1 ☐ Yes 2 ☐ No		X 7	c. If "No," how much did you forward to taxing agencies for such taxes?	Dollars	Cents	XX X 8	d. Total ANNUAL payroll in 1967 before deductions	XX	XX	X 9
Number and street	City, village, or other place																																		
State	ZIP code																																		
1. ☐ % General public (household consumers, farmers, and individuals)	XX																																		
2. ☐ % Construction and building trade contractors	XX																																		
3. ☐ % Other business firms, government, and institutions	XX																																		
4. ☐ % Other (Specify)	XX																																		
	Dollars	Cents	Key																																
a. Sales of merchandise and other receipts from customers	XX	XX	X 6																																
b. Does the entry in "a" include sales taxes and excise taxes collected from customers?	1 ☐ Yes 2 ☐ No		X 7																																
c. If "No," how much did you forward to taxing agencies for such taxes?	Dollars	Cents	XX X 8																																
d. Total ANNUAL payroll in 1967 before deductions	XX	XX	X 9																																

A-15

RETAIL TRADE GENERAL QUESTIONS--Continued

9. DEPARTMENT OR CONCESSION LOCATED IN THE ESTABLISHMENT OF ANOTHER FIRM 1-1					
a. Is your business at this location conducted as a department or concession (such as a paint department in a department store) in an establishment operated by another firm? Mark "Yes," if customers normally consider your operation as part of the establishment operated by the other firm, or if your sales to customers are billed by that establishment. 1-1 Yes 2-1 No					
b. If "Yes," please enter the name and description (kind of business) of the establishment which is operated by the other firm.		Name		Kind of business	
10. DEPARTMENT OR CONCESSION LOCATED IN THIS ESTABLISHMENT 1-2XX					
a. Is any department, concession, or business not owned by you , operated within this establishment? Mark "Yes," if there is any operation ~~of~~ others which customers normally consider part of your establishment, or if you bill customers for sales of such department, concession, or business. 1-1 Yes 2-1 No					
b. If "Yes," please complete a line for each.					
	2XX	21	21	25	26*
Name and address of owner of department or concession	Kind of business of department or concession	Estimated sales during 1967	Are the sales of this department included in item 7a?		Is the pay roll of this department included in item 7d?
		Dollars	Yes	No	Yes No
1			1	2	1 2
2			1	2	1 2
3			1	2	1 2
11. YOUR BUSINESS LOCATIONS					
a. In 1967 did you operate your business at more than one location under the Employer Identification Number you had at the end of 1967? 1-1 Yes 2-1 No					
b. If "Yes," is marked above, separately list below each location, including your main selling location and facilities other than selling establishments (such as warehouses, central administrative offices, buying offices, etc.)					
Address of business (Number, street, city or town, county, State, ZIP code)	Description of business	Census Use Only	Sales		Number of paid employee (Pay period including March 12)
			Dollars	Cents	
1				XX	
2				XX	
3				XX	
4				XX	
Totals for this Employer Identification Number (Sales total should equal the entry in item 7a)				XX	

From this questionnaire
comes information about
cities, counties, and SMSA's.

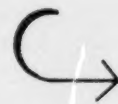


TABLE States: 1967—Continued

State and SALES SIZE OF ESTABLISHMENT (ANNUAL SALES VOLUME)	Estab- lishments number	Sales \$1,000	Payroll entire year \$1,000	Estab- lishments number	Sales \$1,000	Payroll entire year \$1,000	Estab- lishments number	Sales \$1,000	Payroll entire year \$1,000
NEBRASKA									
RETAIL TRADE: TOTAL									
ALL ESTABLISHMENTS: TOTAL	16 567	2 555 498	266 868	1 479	317 999	29 283	536	91 805	12 173
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	15 189	2 464 456	256 266	1 438	309 056	28 372	527	89 981	11 863
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	374	836 040	87 427	36	54 917	3 947	3	5 366	587
\$500,000 TO \$999,000	363	464 657	44 154	130	42 940	8 380	27	19 917	2 934
\$300,000 TO \$499,000	711	271 088	28 177	170	46 355	4 119	29	11 030	1 237
\$100,000 TO \$299,000	3 429	561 477	59 440	418	77 080	8 115	236	38 546	5 035
\$50,000 TO \$99,000	3 207	227 060	22 503	318	23 096	2 207	143	19 438	1 367
\$30,000 TO \$49,000	2 293	88 967	8 425	214	17 034	1 082	73	4 909	354
LESS THAN \$30,000	5 592	75 318	8 419	371	4 744	1 522	116	1 935	271
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	168	91 040	10 602	141	8 943	911	109	1 824	310
IN BUSINESS AT END OF YEAR	716	40 411	5 305	11	2 926	253	11	516	71
TOYS (SIC 59)									
HARDWARE STORES (SIC 521)									
ALL ESTABLISHMENTS: TOTAL	459	35 306	3 295	507	190 888	13 815	652	287 556	43 674
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	443	34 212	3 113	500	184 803	13 396	631	274 130	41 776
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	5	—	—	53	44 811	3 360	49	200 249	32 629
\$500,000 TO \$999,000	5	2 945	368	58	70 077	5 008	35	24 646	3 738
\$300,000 TO \$499,000	6	2 351	361	85	52 974	2 525	35	13 396	2 009
\$100,000 TO \$299,000	92	14 569	1 299	127	24 165	1 781	141	22 836	2 322
\$50,000 TO \$99,000	110	8 080	540	63	4 368	300	99	7 331	563
\$30,000 TO \$49,000	120	4 568	401	67	2 557	285	107	3 803	383
LESS THAN \$30,000	110	1 698	144	25	1 111	67	165	1 867	134
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	16	1 094	182	107	6 025	419	121	13 426	1 896
IN BUSINESS AT END OF YEAR	16	452	34	14	1 958	146	21	10 722	1 815
FARM EQUIPMENT DEALERS (SIC 5252)									
GENERAL MERCHANDISE GROUP STORES (SIC 53 PARTS)									
ALL ESTABLISHMENTS: TOTAL	552	287 556	43 674	652	287 556	43 674	652	287 556	43 674
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	543	274 130	41 776	631	274 130	41 776	631	274 130	41 776
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	49	200 249	32 629	49	200 249	32 629	49	200 249	32 629
\$500,000 TO \$999,000	5	24 646	3 738	5	24 646	3 738	5	24 646	3 738
\$300,000 TO \$499,000	6	13 396	2 009	6	13 396	2 009	6	13 396	2 009
\$100,000 TO \$299,000	92	22 836	2 322	92	22 836	2 322	92	22 836	2 322
\$50,000 TO \$99,000	110	7 331	563	110	7 331	563	110	7 331	563
\$30,000 TO \$49,000	120	3 803	383	120	3 803	383	120	3 803	383
LESS THAN \$30,000	110	1 867	134	110	1 867	134	110	1 867	134
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	16	13 426	1 896	16	13 426	1 896	16	13 426	1 896
IN BUSINESS AT END OF YEAR	16	10 722	1 815	16	10 722	1 815	16	10 722	1 815
DEPARTMENT STORES (SIC 541)									
ALL ESTABLISHMENTS: TOTAL	59	207 987	33 583	223	38 740	5 785	375	40 829	3 905
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	56	197 934	31 245	220	38 464	5 760	355	37 732	3 793
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	40	186 619	30 407	129	30 407	5 008	14	101	101
\$500,000 TO \$999,000	5	—	—	9	101	101	14	101	101
\$300,000 TO \$499,000	16	11 315	1 036	20	7 855	1 376	14	5 166	567
\$100,000 TO \$299,000	—	—	—	55	10 539	1 214	75	12 007	1 070
\$50,000 TO \$99,000	—	—	—	40	3 046	287	54	4 285	476
\$30,000 TO \$49,000	—	—	—	44	1 552	175	63	2 251	208
LESS THAN \$30,000	—	—	—	56	497	60	129	1 380	74
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	3	10 053	1 738	103	276	45	12	3 097	113
IN BUSINESS AT END OF YEAR	3	10 053	1 738	103	276	45	12	3 097	113
FOOD STORES (SIC 541)									
ALL ESTABLISHMENTS: TOTAL	1 034	477 187	34 656	1 400	450 765	31 588	78	9 031	804
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	1 027	460 831	33 394	1 394	436 761	30 617	73	8 005	739
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	113	209 362	16 024	112	209 362	16 024	112	209 362	16 024
\$500,000 TO \$999,000	139	96 894	7 502	137	96 894	7 502	137	96 894	7 502
\$300,000 TO \$499,000	108	40 819	2 890	107	40 819	2 890	107	40 819	2 890
\$100,000 TO \$299,000	423	69 817	3 769	316	60 491	2 871	17	3 018	280
\$50,000 TO \$99,000	414	28 266	2 148	311	22 390	1 299	18	1 288	105
\$30,000 TO \$49,000	209	8 206	642	175	5 358	285	8	306	20
LESS THAN \$30,000	371	5 474	369	284	2 437	101	23	389	31
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	11	16 356	1 262	11	14 004	971	5	1 026	65
IN BUSINESS AT END OF YEAR	11	3 594	310	11	2 902	187	5	116	7
GROCERY STORES (SIC 541)									
ALL ESTABLISHMENTS: TOTAL	1 400	450 765	31 588	1 400	450 765	31 588	1 400	450 765	31 588
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	1 394	436 761	30 617	1 394	436 761	30 617	1 394	436 761	30 617
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	112	209 362	16 024	112	209 362	16 024	112	209 362	16 024
\$500,000 TO \$999,000	137	96 894	7 502	137	96 894	7 502	137	96 894	7 502
\$300,000 TO \$499,000	107	40 819	2 890	107	40 819	2 890	107	40 819	2 890
\$100,000 TO \$299,000	316	60 491	2 871	316	60 491	2 871	316	60 491	2 871
\$50,000 TO \$99,000	311	22 390	1 299	311	22 390	1 299	311	22 390	1 299
\$30,000 TO \$49,000	175	5 358	285	175	5 358	285	175	5 358	285
LESS THAN \$30,000	284	2 437	101	284	2 437	101	284	2 437	101
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	11	14 004	971	11	14 004	971	11	14 004	971
IN BUSINESS AT END OF YEAR	11	2 902	187	11	2 902	187	11	2 902	187
MEAT AND FISH (SEA FOOD) MARKETS (SIC 542)									
ALL ESTABLISHMENTS: TOTAL	78	9 031	804	78	9 031	804	78	9 031	804
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	73	8 005	739	73	8 005	739	73	8 005	739
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	1	101	101	1	101	101	1	101	101
\$500,000 TO \$999,000	1	101	101	1	101	101	1	101	101
\$300,000 TO \$499,000	1	101	101	1	101	101	1	101	101
\$100,000 TO \$299,000	1	101	101	1	101	101	1	101	101
\$50,000 TO \$99,000	1	101	101	1	101	101	1	101	101
\$30,000 TO \$49,000	1	101	101	1	101	101	1	101	101
LESS THAN \$30,000	1	101	101	1	101	101	1	101	101
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	5	1 026	65	5	1 026	65	5	1 026	65
IN BUSINESS AT END OF YEAR	5	116	7	5	116	7	5	116	7
FRUIT STORES AND VEGETABLE MARKETS (SIC 543)									
ALL ESTABLISHMENTS: TOTAL	31	2 073	87	43	1 104	181	196	6 871	1 505
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	30	101	101	36	894	94	149	5 447	1 389
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	—	—	—	—	—	—	—	—	—
\$500,000 TO \$999,000	—	—	—	—	—	—	—	—	—
\$300,000 TO \$499,000	—	—	—	—	—	—	—	—	—
\$100,000 TO \$299,000	8	101	101	7	101	101	10	1 306	335
\$50,000 TO \$99,000	6	403	9	5	179	31	35	2 478	972
\$30,000 TO \$49,000	4	139	9	4	101	101	42	1 637	313
LESS THAN \$30,000	12	164	4	27	277	13	52	1 026	169
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	1	101	101	7	215	27	11	424	116
IN BUSINESS AT END OF YEAR	1	101	101	7	101	101	11	101	22
CANDY, NUT, AND CONFECTIONERY STORES (SIC 544)									
ALL ESTABLISHMENTS: TOTAL	43	1 104	181	43	1 104	181	43	1 104	181
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	36	894	94	36	894	94	36	894	94
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	—	—	—	—	—	—	—	—	—
\$500,000 TO \$999,000	—	—	—	—	—	—	—	—	—
\$300,000 TO \$499,000	—	—	—	—	—	—	—	—	—
\$100,000 TO \$299,000	7	101	101	7	101	101	10	1 306	335
\$50,000 TO \$99,000	5	179	31	5	179	31	35	2 478	972
\$30,000 TO \$49,000	4	101	101	4	101	101	42	1 637	313
LESS THAN \$30,000	12	164	4	27	277	13	52	1 026	169
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	7	215	27	7	215	27	11	424	116
IN BUSINESS AT END OF YEAR	7	101	101	7	101	101	11	101	22
OTHER FOOD STORES (SIC OTHER 54)									
ALL ESTABLISHMENTS: TOTAL	124	7 338	551	1 031	424 576	36 876	693	374 411	30 859
ESTABLISHMENTS OPERATED ENTIRE YEAR: TOTAL	115	6 871	505	1 001	415 862	36 117	671	366 959	30 277
WITH ANNUAL SALES OF—\$1,000,000 OR MORE	—	—	—	100	230 302	20 619	97	224 982	19 895
\$500,000 TO \$999,000	1	101	101	117	83 094	7 125	102	73 331	6 008
\$300,000 TO \$499,000	1	101	101	112	43 027	3 405	90	34 711	2 436
\$100,000 TO \$299,000	20	2 871	195	142	44 759	3 820	142	26 145	1 528
\$50,000 TO \$99,000	21	1 528	132	123	8 857	738	62	4 371	227
\$30,000 TO \$49,000	16	101	101	78	3 064	252	47	1 866	127
LESS THAN \$30,000	16	681	51	221	2 759	158	131	1 551	56
ESTABLISHMENTS NOT OPERATED ENTIRE YEAR: TOTAL	9	101	101	11	8 714	754	11	7 452	582
IN BUSINESS AT END OF YEAR	9	318	74	30	4 480	394	22	4 079	306
FRUIT STORES AND VEGETABLE MARKETS (SIC 543)									
ALL ESTABLISHMENTS: TOTAL	31	2 073	87	43	1 104	181	196	6 871	1 505
ESTABLISHMENTS OPERATED ENT									

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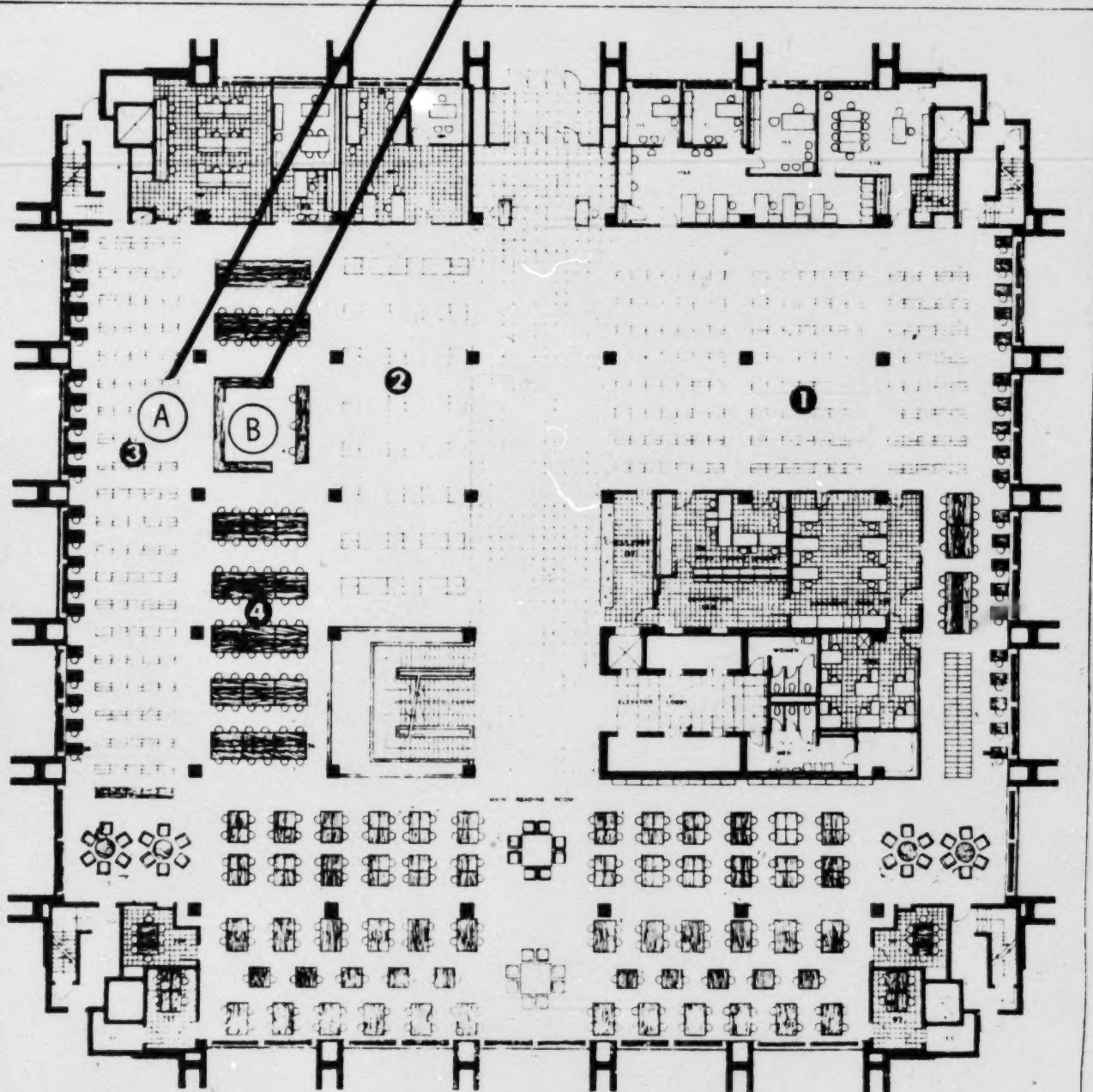
- 1. Documents
- 2. Catalogs
- 3. Reference Collections
- 4. Indexes

(A)

Census of Population
Census of Business
Directory of Federal Statistics
County Business Patterns

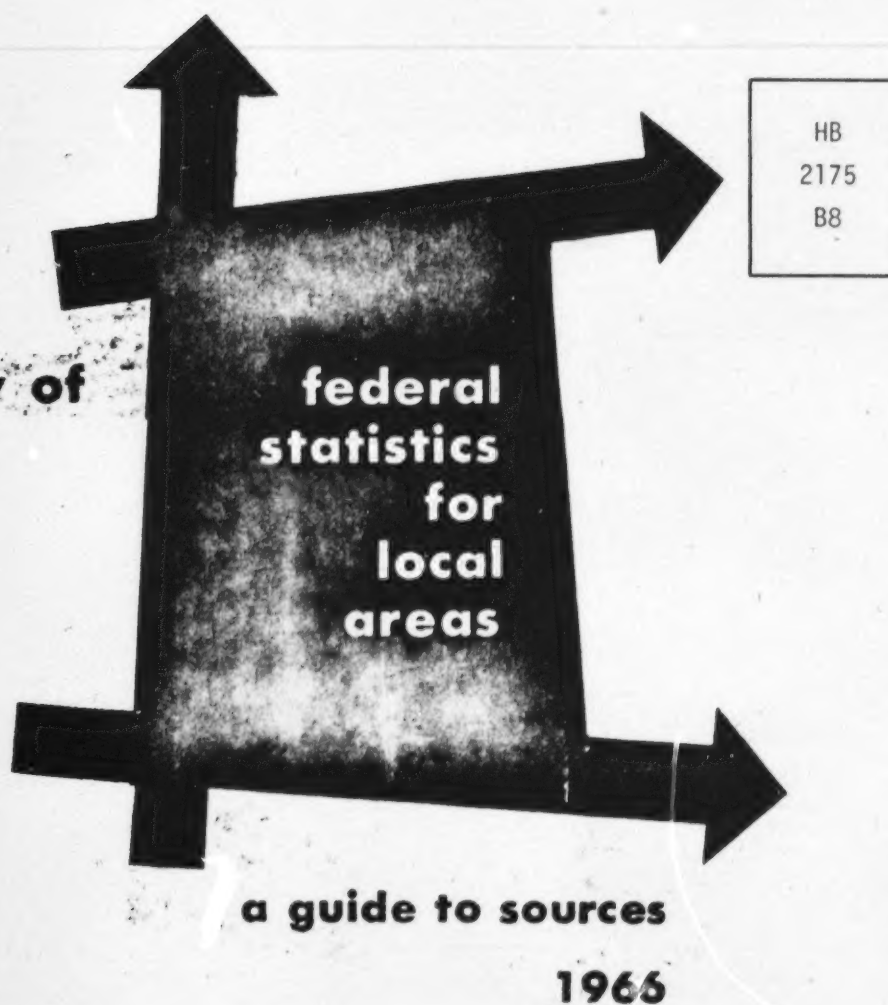
(B)

Current Statistical Abstract



VIII.

Directory of Federal Statistics
for Local Areas



308

The Directory of Federal Statistics for Local Areas is located on the first floor reference collection, location (A) on the first floor map (p.35). This directory, though a one-shot deal in 1966, is still useful as sources of data. If, for example, you are opening a small food store and you want to check the pattern of food costs.

The subject index on page 153 will yield:

oyment.
 9, 20
 distributors: 102
 94
 : 127
 aning, commercial, fish landings data:
 Flight and flight plans, aircraft: 115, 117
 Flood control projects: 41
 FM stations: 119
 → Food cost index: 90
 Foreign
 -born population: 8, 15-17, 23, 24
 commerce at selected ports: 107, 118
 stock: 15, 16
 trade, vessel tonnage: 107, 117, 118
 travel: 120
 Forest products: 126
 Foundation, type of, in housing units: 64, 65
 Fowl: 125
 Frame homes: 65
 Freezers, home: 65, 122
 Freight shipments: 111, 116-118
 Fringe benefits: 86-89
 Frozen food lockers, bulk storage: 105
 in man:

Following up the reference to page 90, you will be directed to:



PRICES

[Index, 1957-59=100; unless otherwise specified. All details indented below a group of braced items apply to each item within the brace]

Subject and tabular detail	AREA [Figures in columns denote number of areas or size limitations. Plus (+) after figure means "or more"]				Frequency	Source document and explanatory notes
	SMSA's	Counties	Cities and urban places	Other		
Food						
Total; by type(7): Index this month; percent change, previous month to this month	21				Monthly	76. "The Consumer Price Index," BLS.
Total Most recent index; last 12 mos. Annual indexes, 2 previous yrs.	23		2		Monthly	81. Monthly Labor Review, BLS.

Statistical Abstracts

Published annually, this is the standard summary of statistics on social, economic, and political organization of the United States. A national data guide book to the sources.



UNDER the counter, no less,
at the Reference Desk, 1st
floor Map, (B)

Not that it's subversive --
just useful!!!

FOR EXAMPLE

No. 1242. RETAIL TRADE—ESTABLISHMENTS, SALES, AND PERSONNEL, 1958,
[For 1958, totals include, and kind of business]

KIND OF BUSINESS	1958			1963		
	Total establishments	Sales, all establishments	Paid employees	Total establishments	Sales, all establishments	Paid employees
Retail trade, total	1,794,744	<i>Mil. dol.</i> 290,353	7,942,144	1,707,931	<i>Mil. dol.</i> 244,262	8,410,199
Building materials, hardware, farm equipment dealers	186,379	14,328	445,910	32,703	14,606	395,861
Building materials, supply stores	54,870	8,406	203,987	46,746	8,430	235,914
Lumber, other building materials dealers	34,867	7,123	212,456	28,979	7,023	188,152
Heating, plumbing equipment dealers	8,664	45				
Paint, glass, hardware stores	11,155	74				
Electrical supply stores	1,984	8				
Hardware stores	34,670	2,71				
Farm equipment dealers	19,008	3,18				
General merchandise group stores	87,182	21,97				
Department stores	3,457	13,35				
Variety stores	21,017	3,62				
Miscellaneous general merchandise stores	82,708	4,991				
Food stores	356,734	49,228				
Grocery stores, including delicatessens	259,796	43,696				
Meat markets	23,844	2,327				
Fish (seafood) markets	4,339	194				
Fruit stores, vegetable markets	12,689	508				
Candy, nut, confectionery stores	17,593	528				
Retail bakeries	19,236	908				
Automotive dealers	31,845	31,908				
Motor vehicle dealers	63,886	28,309				
New and used cars	38,555	28,336				
Used cars only	25,331	2,983				
Tire, battery, accessory dealers	30,912	2,425				
Miscellaneous automotive dealers	8,588	1,073				
Gasoline service stations	296,755	14,228				
Apparel, accessory stores	119,252	12,569				
Women's ready-to-wear stores	(NA)	(NA)				
Women's accessory, specialty stores	(NA)	4,909				
Furriers and fur shops	(F)	(F)				
Other apparel and accessory stores	(NA)	(NA)				
Men's, boys' clothing, furnishings stores	(NA)	(NA)				
Furniture, home furnishings, equipment	103,745	16,110				
Furniture, home furnishings stores	54,458	8,959				
Household appliance stores	24,224	2,844				
Radio, television stores	16,781	966				
Music stores	7,974	566				
Eating, drinking places	346,245	15,790				

Retail Trade

745

1963, AND 1967, AND PAYROLL, 1967, BY KIND OF BUSINESS
[details exclude, Alaska and Hawaii]

Total establishments	Total establishments with payroll	SALES		PAYROLL		Paid employees	Number of proprietors
		All establishments	Establishments with payroll	Entire year	First quarter		
		<i>Mil. dol.</i>	<i>Mil. dol.</i>	<i>\$1,000</i>	<i>\$1,000</i>		
1,763,334	1,191,546	310,214	296,170	34,174,723	8,911,937	9,380,416	1,624,451
86,273	69,918	17,200	16,644	2,027,127	487,238	494,131	79,652
42,472	36,534	9,555	9,381	1,250,206	301,177	236,118	20,171
(NA)	24,206	(NA)	7,864	1,022,271	242,444	188,715	(NA)
(NA)	2,241	(NA)	840	56,241	14,029	10,554	(NA)
(NA)	8,790	(NA)	1,019	159,925	38,847	31,257	(NA)
(NA)	827	(NA)	158	22,869	5,857	4,592	(NA)
(F)	27,162	(F)	2,556	336,263	82,647	62,038	25,993
(NA)	16,739	(NA)	4,708	428,548	103,412	88,981	14,888
(NA)	51,770	(NA)	43,127	6,160,272	1,415,191	1,644,549	49,688
(NA)	5,792	(NA)	32,344	4,673,428	1,085,926	1,174,351	1,051
(NA)	21,046	(NA)	5,407	837,008	300,405	280,348	11,966
103,745	10,469	26,050	8,435	649,549	159,163	180,850	30,639
54,458	294,243	171,706	66,941	5,542,793	1,358,837	1,444,469	278,837
24,224	61,771	65,073	81,771	4,897,458	1,194,337	1,241,787	204,327
16,781	1,383		1,383	141,714	36,473	34,096	19,129
7,974	178		178	19,142	4,170	3,919	9,987
	324		324	32,566	7,705	7,341	12,911
	369		369	65,037	18,173	21,345	17,553
	1,249		1,249	243,814	73,921	98,524	85,774
	54,597		54,597	5,256,532	1,285,935	1,318,853	234,790
	47,913		47,913	4,416,499	1,118,853	1,118,853	
	45,480		45,480	4,231,716			

No. 1265. ADVERTISING—ESTIMATED EXPENDITURES: 1940 TO 1972
[In millions of dollars]

YEAR	Total	National	Local	YEAR	Total	National	Local
1940	2,038	1,113	925	1967	12,351	7,061	5,290
1941	2,875	1,775	1,100	1968	13,107	8,121	4,986
1942	3,710	2,207	1,503	1969	14,155	8,713	5,442
1943	4,194	2,407	1,787	1970	15,255	9,355	5,900
1944	4,750	2,750	2,000	1971	16,670	10,176	6,494
1945	5,382	3,153	2,229	1972	16,896	10,250	6,646

Source: McCann-Erickson Advertising Agency, Inc., 1940-1966, in *Advertising Age*, New York, N.Y., in *Advertiser's Age* (copyright 1967-1969), in *Advertiser's Age* (copyright 1970-1972), compiled for Chain Communications, Inc., in *Advertising Age*.

1266. ADVERTISING—INDEXES OF NATIONAL / MEDIUM: 1950 TO 197

[1957=100. Based on the average monthly expenditure for those

MEDIUM	1950	1955	1960	1965
Television	31	52	70	91
Radio	49	57	74	94
Newspapers	49	61	81	95
Weekly	46	57	65	60
Women's	24	13	61	106
	106	111	91	106

POPULATION

2 Total, incl. Armed Forces abroad
Net annual increase over previous year

13 Resident population	Per square mile	13 North	13 North Central	13 South	13 West
17 Urban	17 Rural	17 Male	17 Female	17 Total	17 Total
100	100	100	100	100	100
98	92	115	111	109	109
105	113	122	137	137	137
	110				

RECENT TRENDS

Unit of measure 1960 1965 1970 1971 1972
Percent change, average per year
1960 1965 1971
65 70 72

		180.7	194.3	204.9	207.0	208.8	15	1.1	1.0
		2.84	2.40	2.20	2.17	1.79	-3.3	-1.8	-0.9
Millions							15	1.0	1.1
Millions							15	0.7	1.0
Millions		180.0	193.5	201.8	206.2	208.2	15	1.0	1.1
Number		51	55	57	57	59	15	0.7	1.0
Millions		44.8	47.5	49.2	49.6	49.8	10	0.9	0.9
Millions		51.7	54.2	56.7	57.1	57.6	15	1.1	1.1
Millions		55.2	59.6	61.0	61.0	61.9	2.6	1.6	1.6
Millions		20.3	32.2	35.0	35.5	36.1			
Millions							na	* 1.8	
Millions		125.3	na	149.3	na	na	na	* 1.8	
Millions		54.1	na	51.9	na	na	14	0.9	
Millions		186.6	94.0	197.2	100.4	101.5	1.6	1.7	
Millions		91.3	98.7	104.6	105.8	106.8			
Millions							14	0.9	
Millions		159	171	179	181	182	2.1	1.8	
Millions		20.6	22.9	25.0	25.5	26.0	2.0	1.5	
Millions		19.0	21.0	22.7	23.1	23.4	na	na	
Millions		11	11	11	11	11	na	na	
Millions		11	11	11	11	11	na	na	
2.018		11	54	64	9.4	9.0	5.2	na	* 0.3
3.447		632,090					na	na	* 1.1
100		189,630			47.784			na	* 1.1
120		972			7.784		8,890	na	* 1.1

X.

County Business Patterns

County Business Patterns 1972

HC
101
A184

MOS
1 FCI

A UNITED STATES
DEPARTMENT OF
COMMERCE
PUBLICATION



CBP-72-34

REFERENCE



NEW YORK



Presents employment and payroll statistics by county and by industry. They are useful for analyzing market potential, measuring the effectiveness of sales and advertising programs and setting sales quotas and budgets.

Examples of column heads

Located A on the reference shelves on the first floor.

Column Headings of the Tables

Tables

1A. The State: 1972 and 1971

1F. The State, by County: 1972 and 1971

SIC code	Major industry group	Number of employees, mid March pay period	Taxable payrolls, Jan-Mar (\$1,000)	Total reporting units	Number of employees, mid March pay period	Taxable payrolls, Jan-Mar (\$1,000)	Total reporting units
----------	----------------------	---	-------------------------------------	-----------------------	---	-------------------------------------	-----------------------

Tables

1B. The State, by Industry: 1972

2. Counties: 1972

3. Standard Metropolitan Statistical Areas: 1972

Metropolitan State Economic Areas: 1972 (Replaces SMSA's for New England)

SIC code	County and industry	Number of employees, mid March pay period	Taxable payrolls, Jan-Mar (\$1,000)	Total reporting units	Number of reporting units, by employment size class				
					1 to 3	4 to 7	8 to 19	20 to 49	50 to 99

Major industry group, in table 3

Table

1C. The State; Employees, by Employment-Size Class: 1972

SIC code	Major industry group	Total mid March pay period	Employees, by employment size class of reporting units				
			1 to 3	4 to 7	8 to 19	20 to 49	50 to 99

Tables

1D. The State; Administrative and Auxiliary Units: 1972

SIC code	Major industry group	Number of employees, mid March pay period	Taxable payrolls, Jan-Mar (\$1,000)	Total reporting units
----------	----------------------	---	-------------------------------------	-----------------------

Table 1E. The State; Reporting Units with 500 Employees or More, Employment-Size Class: 1972

SIC code	Major industry group	Total reporting units	Number of reporting units, by employment size class				
			500 to 999	1,000 to 1,499	1,500 to 2,499	2,500 to 4,999	5,000 or more

XI.

Current Business Reports

The Bureau of the Census of the U.S DEPARTMENT OF COMMERCE publishes a series of Current Business Reports, which are useful to give you current information about monthly retail sales and accounts receivable for retail stores by kind of business.

Reports in Bird Library are on BASEMENT LEVEL at Location (D) on your map on page 49, on the Periodical Shelves filed alphabetically.

Back copies are on shelves on Fourth Floor

HF
5429
U44
1970

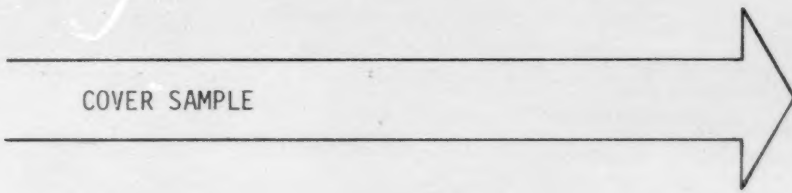
Titles available:

Monthly Department Store Sales

Monthly Retail Trade (Sales and Accounts Receivable)

Retail Trade Annual Report (Last one is for 1972, but only issued in Jan. 1974)

Monthly Selected Services Receipts



COVER SAMPLE



Monthly Department Store Sales

IN SELECTED AREAS

Issued June 1974

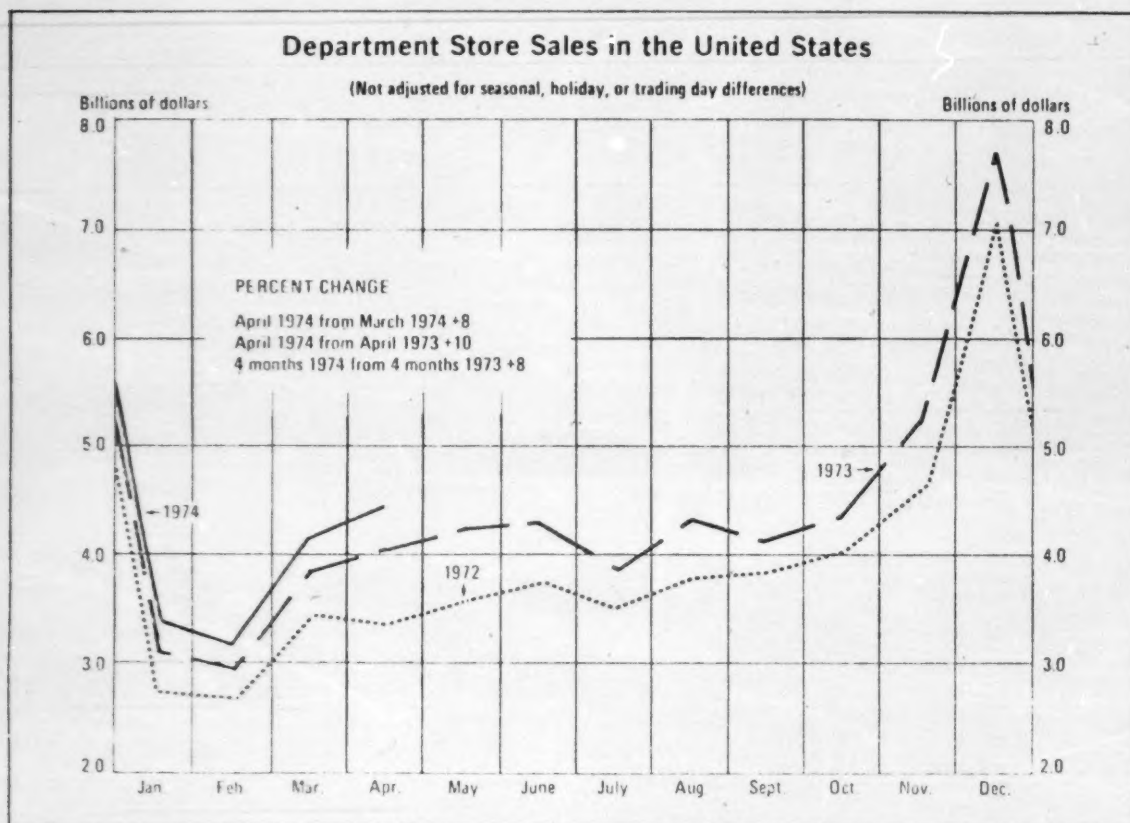
April 1974

BD-74-4

Total sales for all department stores in the United States during April 1974 were estimated at \$4,478 million, about 8 percent above the estimated sales for March 1974 and 10 percent above estimated sales for April 1973. After adjustments for seasonal variations and trading day differences but not for price changes, national April 1974 department store sales amounted to \$4,665 million, about 1 percent below March 1974 but 11 percent above April 1973. The area data on pages 2 through 4 of this report are not adjusted, since seasonal,

holiday, and trading day factors are not available for individual areas.

For the five standard metropolitan statistical areas with largest department store sales, the total unadjusted sales for April 1974 and comparisons with April 1973 were: Chicago, Ill., SMSA--\$199 million, up 10 percent; Los Angeles-Long Beach, Calif., SMSA--\$196 million, up 13 percent; New York, N.Y., SMSA--\$171 million, up 9 percent; Detroit, Mich., SMSA--\$124 million, up 3 percent; Philadelphia, Pa., SMSA--\$109 million, up 13 percent.



U.S. DEPARTMENT OF COMMERCE | Social and Economic Statistics Administration | BUREAU OF THE CENSUS

For sale by Publications Distribution Section, Social and Economic Statistics Administration, Washington, D.C. 20233, and U.S. Department of Commerce District Offices. Price 10 cents per copy. Annual subscription \$1.00.

INDEXES TO NEWSPAPERS

Included are:

- New York Times Index
- Wall Street Journal Index

The New York Times

THE WALL STREET JOURNAL,
Friday, September 20, 1974

Consumer Product Warranty Standards
Voted by House and Sent to Conferees

Rail Freight Traffic
Rose From Prior Week

But Fall 6 1/2% From '73

Tough Turnaround
Now Only No. 2, A&P
Is Trying Harder—
But Harder Enough?

as been excellent. complaints, however, a tendency to hold back on fall tops appear to be selling item in childswear, according to Israel of the Justice Company, Inc. "It's sweat-high two averages

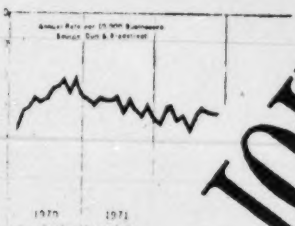
Business Bulletin

A Special Background Report
On Trends in Industry
And Finance

on a year with its on its books recently added story facilities



Business Failures



BUSINESS
ally adj
ly from
repe

WALL STREET JOURNAL

© 1974 Dow Jones & Company, Inc. All Rights Reserved.
Inbred Management Leads
To a Lack of Leadership,
Critics, Competitors Say
'WEO' Sales Were Costly
to the employ
panies to

In 1973 this number
million fem. in the civilian
the civilian number
creased to 32.4 million
penditures for women
children's apparel rose from

Bloomingdale's and Its Cust
Dancing Chic to Chic

The Boom in Infants' Apparel
Waste in Marketing

THE

The New York Times Magazine

PART 2 | SECTION 6 | SEPTEMBER 15, 1974

REPORT ON
MEN'S WEAR

317

- 45 -

XII.

New York Times Index

The New York Times Index is located at the Basement Level of the Bird Library, Location **A** on the map, page 49.

Ref
AN
43
NN 565
Index

If you need help deciding on a key word to search with -- Use THE NEW YORK TIMES THESAURUS OF DESCRIPTORS, a guide for organizing a search of information on current events.

Ref

Z

695

.1

C87

1971

RETAIL Stores and Trade

See also

Advertising (NT)

Consumer Protection (NT)

Credit (NT)

Markets (BT)

Office Buildings and Other
Commercial Properties (if
inclusion) (BT)

Shoplifting (NT)

Sunday Observance (NT)

Taxation (NT)

Trademarks and Trade Names

industries, commodity and consumer

types of stores

Used for

Department Stores (NT)

Variety Stores (NT)

THE NEXT PAGE SHOWS YOU HOW TO USE THE NEW YORK TIMES INDEX

HOW TO USE THE NEW YORK TIMES INDEX

This diagram shows how headings and subheadings for the New York Times Index are developed.

NIXON WILL PRESS
REVENUE SHARING
IN NEW CONGRESS

Special to the
New York Times

WASHINGTON, Jan 4-
President Nixon said
tonight that he would
make a far-reaching
new revenue sharing
proposal in his
State of the Union
Message later this
month and would cam-
paign vigorously in
Congress for its en-
actment.

In a 1-hour tele-
vision interview
with four TV network
commentators, Mr.

Nixon said that his
plan for sharing fed-
eral revenues with
the state and local
governments would
make up "the major
thrust" of this
address.

He said that he
would also make a
new appeal for
welfare reform, and
propose a sweeping
new health program
but would not ask
for

NIXON, Richard Milhouse (Pres.) See also
Med-US, Ja 5
US-Finances-Federal Revenue Sharing, Ja 5

UNITED States
Finances

Federal Revenue Sharing and Grants-in-Aid
Pres Nixon says he will make far-reaching
revenue sharing proposal in his State of
Union Message and will campaign vigor-
ously in Cong for its enactment, TV
talk with 4 network correspondents,
Ja 5, 1:8

News and News Media

Pres Nixon hold 1-hr TV talk with network
correspondence E. Severied of CBS, H.K. Smith
of ABC, N. Dickerson of Pub Broadcasting
Corp and J. Chancellor of NBC in White House
Library; revenue sharing, welfare reform, and
new health program are among subjects
discussed, Ja 5, 1:8

MEDICINE and HEALTH
United States

Pres. Nixon says he will propose
sweeping new health program, TV int,
Ja 5, 1:8

TURN TO THE NEXT PAGE
FOR SOME EXAMPLES!

NEW YORK TIMES INDEX

guarantees in short period of time, noted, Robert C. Holland, member of Bd of Govs of Fed Reserve, points out danger in scheme is that if issuer of such paper is not able to meet its maturities, chain reaction might ensue, adds this could trigger call on banks' guarantees at time banks also may not be able to meet obligations. HR and Sen are considering restrictions on these guarantees (M). F 21,46,2

REAL Estate Investment Trusts (REIT). See also Real Estate. US, F 21

REALTORS, Society of Industrial.

Flies from Caspar press. F 17,VIII,2,5

REALTY Advisory Board, Bronx. See also Housing NYC. Rents, F 17,18

REALTY Committee, National. See also Housing US, F 17

REBOZO, Charles G. See also Pres Elect '72, F 27

Watergate Affair, F 20

RECALL (Election). See also Watergate Affair, F 16

RECESSION, Economic. See Econ Conditions. Labor

Geog headings. Indus names

RECLAMATION of Land. See also Coal—US, F 27

Water (for inclusion in multi-purpose projects). Project

names

RECONNAISSANCE. See Cambodia, F 18 War

names

RECORDING Arts and Sciences, National Academy

of. See also Music, F 23

RECORDINGS (Disk and Tape) and Recording and

Playback Equipment. See also Airlines—Hijacking,

Delta Air Lines, F 27. Data Processing (for other

material on tape recorders and recordings)

Kidnapping, Hearst, Patricia, F 19,22 Kidnapping,

Murphy, Reg, F 22 Murders—Conn, Gibbons,

Barbara, F 24 Murders—NJ, F 19 Postal Service—

US, F 28 TV & Radio—Programs—Music

Wiretapping (for other material on tape recorders and

recordings). Sunday papers, sec II (for news and

notes)

Paramour Records founded by Dan Broder and John

Phillips, Phillips' 2 ex-wives and daughter by first

marriage to make first recordings (S). F 19,29,3; tenor

Lauritz Melchior's career as premier Wagnerian tenor

of his era recalled on occasion of reissue of some of

his recordings, D Harris rev. (L). F 24,II,22,1

RECORDS (Achievements). See also Football,

Soccer, F 21, RCA Corp, F 22

RECREATION Vehicles.

ABA economist, William F Ford says gasoline

shortage has triggered sharp declines in resale value

of recreational vehicles (S). F 16,39,2

RECYCLING of Waste Materials. See also Atomic

Energy—US—Elec Light, F 16 Waste Materials—

NYS, F 19 Waste Materials—US, F 19

RED Cross, American National (ARC). See also Soc

Ins—US, F 25

Pres Nixon proclaims Mar as Red Cross Mo (S),

F 28,11,1

RED Cross, International Committee of the (IRC). See

also Middle East—Israeli-Arab Conflict, F 17,25,26,

28 USSR—Pol, F 20 War and Revolution, F 21

RED Cross, North Korean. See also South Korea, F 26

RED Cross, South Korean. See also South Korea, F 26

RED Sea. See also Oil—Middle East—Egypt, F 18

RED Tide (Sea Condition). See also Water Pollution,

F 24

REDFORD, Robert. See also Motion Pictures—

Awards, F 20

REDGRAVE, Vanessa. See also GB—Pol, F 20

REED, Eugene T (Dr). See also NYS—Econ Con-

ditions—Antiquity, F 19

REED, Monroe Jr. See also Oil—US—Prices, F 24

REES, Jerry. See also Grain—US, F 26

REEVES, Gordon. See also Oil—US, F 21

REGAN, James F. See also Educ—NYC—Finances,

F 22 NYC—Finances—Capital Budget, F 22

REGAN, John (Rev). See also RC Chs, St Mary's

Star of the Sea Church (Queens), F 18

REID, James. See also GB—Pol, F 20

REID, Ogden R (Repr). See also Elec Light—NYC

Met Area, F 28 NYS—Elect—Cong (HR),

Westchester County (NY), F 27 NYS—Elect—Govs,

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REID, Ogden R (Mrs). See also NYS—Elect—Govs,

F 21

REILLY, Michael. See also Robberies—NYC, Bolson,

Edward W (Lt), F 24

REILLY, Peter. See also Murders—Conn, Gibbons,

Barbara, F 24

REILLY, Thomas V. See also Housing—NJ, F 22

REIN, Mercedes (Prof). See also Books—Censorship—

Uruguay, F 26 Uruguay, F 26

REINBERG, Alain (Dr). See also Animals, F 27

REINCKE, Ed (Lt Gov). See also California—

Elections, F 20 News—US, F 20 Pres Elect '72, F 20

REINHOLD, Herbert E Jr. See also Heart, F 23

REIS, Bernard J. See also Art, F 16,20,22,23,26,27,28

RELANCE Group Inc. See also Pergamon Press Ltd

(GB), F 20

RELIGION and Churches. See also names of

interdenominational churches

United States

Rev Roland H Bainton, Yale Divinity School prof

emeritus of ecclesiastical hist, is honored at Yale by

150 former students and colleagues, Bainton, who

does not expect human race to survive 'indefinitely,'

predicts future chs will vary 'infinitely,' career and

studies rev'd (M). F 24,42,4

REMIRO, Joseph M. See also Kidnapping, Hearst,

Patricia, F 16,19,22 Murders—California, Foster,

Marcus A (Dr), F 16,26 Symbionese Liberation

Army, F 21

RENNICK Gallery (Washington, DC).

A 1 flammable article on Rennick Gallery,

Washington, DC, which houses Amer design, craft and

decorative arts collections of Smithsonian Museum,

notes it is 1 of few 'special interest museums' left in

US, illus of various art objects, F 17,VII,ph5

REPUBICA (Pub).

Replica, Spanish language, weekly news magazine

published in Miami, has begun printing its met edition

in NYC, Max Lemick, owner and editor, comments

(S). F 24,5,1

REPORTERS Committee for Freedom of the Press.

See also News, US, F 16,17

REPRODUCTION (Biological). See also Birth

Control. Birth Defects, Coyotes, F 24 Leopards, F 24

Multiple Births, Zoos—NYC, F 23

REPUBLIC National Life Insurance Co.

Tex Ins Comr Don B Odum places Republic Natl

Life Ins Co in 'state of supervision,' sets Apr 29

hearing to discuss co's investments (S). F 28,64,2

REPUBLIC Steel Corp.

William J De Lancy is named chief exec officer,

illus (S). F 20,49,2

REPUBLICAN Party. See also Elections (US) Pres

Election headings, US State, county, city names.

Subjects of other activities

National Committee

Repub Natl Com Chmn George Bush names Mary

Louis Smith com co-chmn (S), F 27,46,6

New Jersey

Vice Pres Ford has accepted inv from NJ Repubs to

appear at Mar 23 fund-raising cocktail party for

Repub state Finance Com, same day that he is

scheduled to attend fund-raising dinner on behalf of

US Repr Charles W Sandman Jr, unsuccessful '73

Repub gubernatorial candidate; Ford's appearance at

both events seen establishing rivalry for Repub funds

that he can generate in NJ since proceeds of cocktail

party will be used exclusively to help pay party's debt

while money raised by Sandman dinner will be

devoted entirely to paying off \$247,000 campaign

debt, Bernard M Shanley, chmn of party's fund-raising

event, says response has been 'extremely favorable'

(M). F 19,69,5

New York State. See also Nassau County (NY),

F 22,23,24,25,27 NYS—Elect—Legis, F 22,23,25,

Oyster Bay (NY), F 23,24

NYS Gov Wilson's apptmt of Bklyn Repub Chmn

George L Clark Jr as State Ins Fund Deputy Exec Dir

seen effort by Wilson to solidify position in Repub

party (S). F 25,16,4

RESEARCH. See also Data Processing. Inventions.

Scholarships. Specific subjects, eg, Astronautics,

Cancer. Geog headings (for indus research in gen)

Inst and orgn names (for grants and projects)

RESEARCH Bureau, American. See also TV—

Programs, F 19

RESERVE Mining Co. See also Water Pollution—

Sewage etc, F 25

RESIDENCE Requirements. See Elections—Voting—

Residence Requirements, NYC—Govt Employes

See also Divorce—US, F 20 Educ—NYC—

Teachers, F 22

RESPIRATORY Diseases. See also Air Pollution.

Containers, F 19 Tobacco

RESSLER, Ed. See also Bowling, F 24

RESTAURANT League of NY. See also Hotels etc—

NYC, F 21

RESTAURANTS. Use Hotels etc

RESTON, James Barrett. See also subjects of articles

RETAIL Merchants Assn, National. See also US—

Econ Conditions, F 19

RETAIL Stores and Trade. See also Advertising.

Consumer Protection. Credit Card—NYC, F 25

Office Bldgs (for inclusion). Shopping. Sunday

Observance. Taxation US—Econ Conditions;

commodity and indus names; state and locality names

(for price controls). Indus, commodity and co names.

Types of stores

United States

Article on bargain-hunting and int with Eric Zuesse,

author of Bargain Finder, best-selling guide to finding

bargains on all kinds of merchandise in NYC, Zuesse

por (M). F 16,35,1; sources rept obstacles in proposed

sale of McCrory Corp to Interstate Stores Inc, say

\$150-million sale of McCrory's chain plus its S Klein

and Britt dept stores to Interstate began faltering

several days ago when opposition developed in form

of several lawsuits; as part of complex transactions,

bds of McCrory and Rapid-American agreed on

merger, with Rapid-American the surviving co, F 16,

41,7; power conservation by Union, NJ, retailers

described; most retailers have shut down ad signs by

midnight in area where ad lighting formerly burned

majority of time; illus; retailers comment (M). F 17,

77,1; Stanley J Goodman, chmn of May Dept Stores

Co, gets avalanche of mail in response to speech he

made at recent annual conv of Natl Retail Merchants

Assn entitled 'Raising the Fallen Image of Business';

in speech, said businessmen have opposed every

major piece of consumer legis for past several

decades; in int, denies he made speech because he

plans to retire and wants to go out 'looking like a

statesman,' as suggested by dept store chain exec;

Goodman's career, por (L). F 19,45,3; energy crisis is

sending retail sales up in midtown NYC dept stores

while their suburban branches are rept lower sales

volume, F 21,1,1; article on complex financial

arrangement between Rapid-American, Interstate and

McCrory Corp, illus of logos of McCrory Corp,

Interstate Stores Inc and Rapid-American Corp, por of

McCrory chmn Samuel Neuman, F 24,III,5,1, 2 of

Nation's largest retail chains issue sharply varying

figs at 74 rept, W T Grant Co rept decline in

earnings on higher sales for fiscal yr ended Jan 31, J C

Penney Co announces 1 1/2% rise in its net on increased

sales for fiscal yr ended Jan 26, Marshall Field A Co

and Rich's Inc rept lower net income for fiscal yr but

increased sales for 4th qt, F 27,49,2, HR rept, 34,1

to 66, effort to delete provision from emergency energy

bill which gives Pres authority to impose energy

conservation measures such as curtailing store hrs and

lighting, subject to veto by Cong, F 28,22,2

•**Sunday Trade**

Washington's Birthday is marked in NYC by holiday

sales in city's retail stores and parade up 5th Av, illus

of parade, F 19,65,1

•**Shopping Centers**

Spokesmen for major NJ shopping centers say

gasoline shortage is changing buying habits of

consumers, rept that there are noticeably fewer cars in

parking lots during day but business is still brisk at

night and on Saturdays; all shopping centers say

business volume has not declined but shoppers are

consolidating their buying and making fewer trips,

Woodbridge Center and Willowbrook Shopping

Centers have launched park-and-ride facilities that provide

commuters with parking space and express bus

service to and from NYC during rush hrs (L), F 17,

102,1; Nassau Mall, 285,000-sq-ft shopping center on

Hempstead Turnpike in Levittown, LI, has been sold for

\$14-million to internal investment group, F 17,

VIII,2,2; Transport of NJ pres John J Gilhooly says

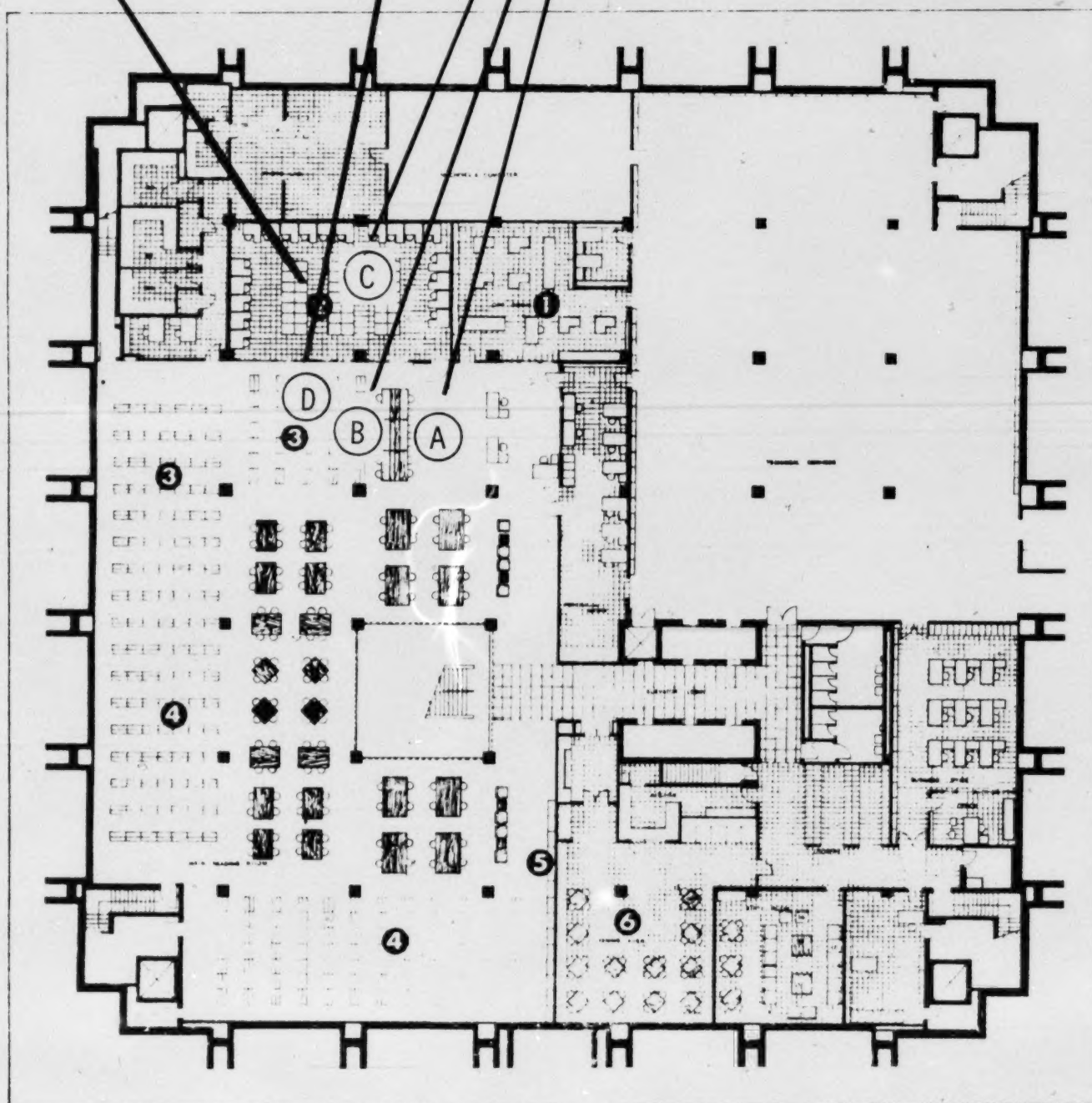
co will open park-and-ride facility at Woodbridge

BASEMENT LEVEL

- 1. Copy Room
- 2. Microfilms
- 3. All Current Periodicals

- 4. General Bound Periodicals
- 5. Newspapers
- 6. Snack Bar

- (A) New York Times Index
- (B) Wall Street Journal Index
- (C) Back issues newspapers microfilmed
- (D) Current Business Reports



nuclear weapons. 3/4-4;2
 Congress smiles on the Pentagon Again:
 Editorial page article on significance of change
 in recent attitude of Congress toward Defense
 Dept. from unfavorable to favorable. 3/5-16;3
 Pentagon's worries about Soviet naval gains
 increase, spur countermeasures. 3/15-1;5
 Eyeball Patrol: U.S. Sixth Fleet daily con-
 fronts Soviet navy in the Mediterranean; forces
 watch each other closely while observing 'a
 proper relationship.' 3/19-1;1
 Cost estimates soar for Air Force's B1 and
 F15 planes, auguring more pressure for
 alternatives. 3/19-7;1
 Editorial on whether those who choose not to
 serve in the armed services during the Vietnam
 war should be welcomed back unconditionally.
 3/20-18;1
 The U.S. and West Germany agreed in
 principle on a new two-year pact under which
 West Germany will help pay the cost for
 supporting U.S. troops stationed there.
 3/20-25;3
 Outlook article on Western European reaction
 to President Nixon's hint of a pullout of U.S.
 troops unless European governments turn
 more cooperative on economic issues.
 3/25-1;5
 Newmont Mining Corp. said its Magma
 Copper subsidiary filed suit seeking to void U.S.
 regulation requiring copper producers to give
 priority to customers with defense-related
 orders. 3/28-19;2
DELAWARE
 A Step Backward? State law halting develop-
 ment on coast, seen as ecological milestone,
 is threatened. 3/15-26;1
DEMOCRACIES
 Editorial highlighting current problems of
 industrial democracies emphasizing how these
 systems are struggling to adjust. 3/19-24;1
DEMOCRATIC PARTY
 A Dour Electorate Waits for the Fall: Editorial
 page feature article showing that 1974 could be
 a year of purge of public officeholders, with
 some Democrats victims along with Republicans
 3/4-12;4
 Fund-raising dinners turn sour for both
 Democrats and Republicans. 3/22-1;5
 House Judiciary Committee splits on party
 lines over President Nixon's cross-examination
 request. 3/22-2;3
 Economic-panel Democrats ask tax cut of
 \$10 billion to halt looming recession. 3/25-3;2
 Editorial on validity of reasons offered by
 Democratic majority of the House Judiciary
 Committee for not wanting President Nixon's
 lawyer around during the panel's impeachment
 inquiry. 3/25-14;1
 Editorial on significance of anticipated
 Democratic landslide in November elections
 and strong possibility of a 'veto-proof' 94th
 Congress next January. 3/26-18;1
DENMARK
 The Danish parliament authorized foreign
 banks to establish full-service in country,
 effective Jan. 1. 3/29-7;3
DENTISTRY
 The fringe on top: A plan to pay medical and
 dental expenses for top officials and their
 families at Kalvex Inc. proves lucrative.
 3/12-1;5
 One mining outfit's chairman, a dentist,
 keeps mouth closed, playing down the bad
 news. Dr. Robert Risk said Leadville will
 be glittering success. 3/20-1;4
DEPARTMENT STORES
 Retail sales in Feb. 25 week totaled \$8.81
 billion, down 0.7% from week before.
 3/1-28;2
 Retail sales totaled \$9.33 billion in Mar. 2
 week, up 1% from 1973 week. 3/8-10;2
 Major retailers' February sales still were
 strong; S.S. Kresge Co. gained 23%, Marcor
 Corp. up 17% and Sears, Roebuck & Co. 8%;

slowing of rise indicated. 3/1-10;2

Retail sales fell 0.7% in February to \$42.6
 billion; third decline in months followed
 January rise as autos continued to sag.
 3/12-2;2

Retail store sales totaled \$9.3 billion in
 Mar. 2 week, up 6% from 1973 week. 3/15-2;4
 Retail sales rose to \$9.63 billion in Mar. 16
 week, up 5% from 1973 week. 3/22-3;2

Canadian retail sales in January rose 2.8%
 from December to a seasonally adjusted \$3.41
 billion. 3/22-14;4

Retail sales totaled \$9.70 billion in Mar. 23
 week, up 7% from 1973 week. 3/29-2;2

DIRECTORS
 (See Management)
DISARMAMENT

reactor power plants will be safe and will have
 minimal adverse impact on the environment.
 3/15-15;4

A Step Backward? Delaware law halting
 development on coast, seen as ecological mile-
 stone, is threatened. 3/15-26;1

Train's Troubles: Energy crisis widens gap
 between President Nixon, environment side;
 EIS's head compromises, but doesn't yield
 easily; he insists he won't quit. 3/22-1;1

ECONOMIC OUTLOOK

Widely differing views of 1974 economy are
 offered to governors by Herbert Stein, others.
 3/7-8;2

Business delays some spending until late 1974;
 energy worries cut into growth plans, but slump
 won't last, surveys say. 3/8-5;2

XIII.

Wall Street Journal Index

This Index is located in a carrel near the Period-
 ical Desk at Location (B) on the Basement Level
 map of the Bird Library.

Ref
HG
I
W18
1973

The Index is in two parts:

CORPORATE NEWS in first section listed by
 corporations alphabetically listed.

GENERAL NEWS in second section. This page is
 for March 1974 Index including "department
 stores."

Copies of the Wall Street Journal itself are at
 the same locations as the New York Times.

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With reference in hand you may find the original in:

Current Issues at Location ⑤ on Basement Level map (p. 49) of Bird Library.

Issues for last three weeks--Lift shelves where current issues are displayed and VOILA!

Issues three weeks--three months are bundled on adjacent shelves.

Issues more than three months old are on Film #96 at Location ③ within the microfilm room which is at Location ② on your Basement Level map.

HAPPY HUNTING !!!

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